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## Information Outlook, August 2003

Special Libraries Association

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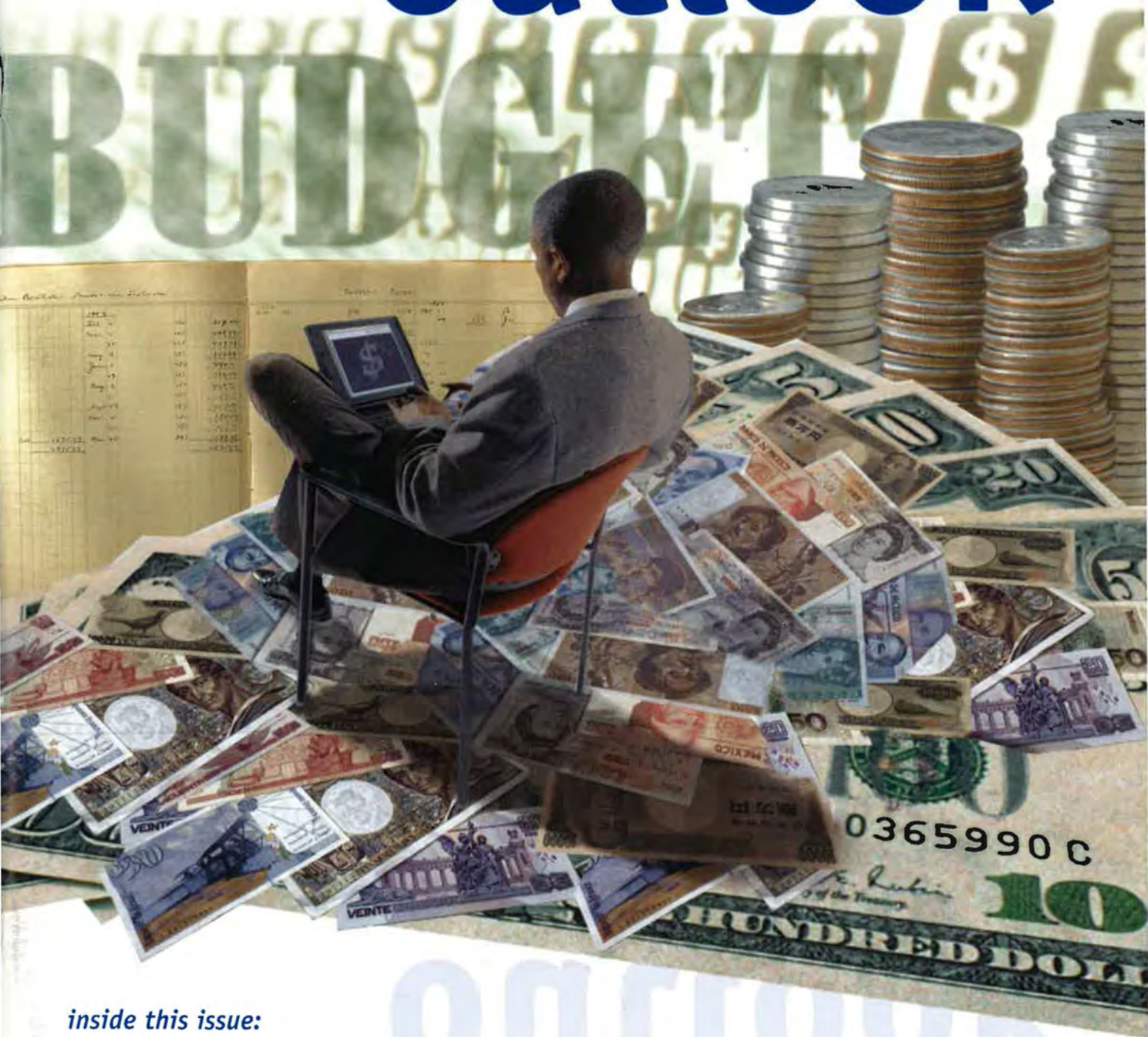
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the monthly magazine of the  
special libraries association  
vol. 7, no. 8  
August 2003



## *inside this issue:*

Holistic Budgeting: A process

Reference and Instruction Services Go Virtual as a Form of Outreach

2003 New York Conference Wrap Up

Business Intelligence and Knowledge Management

At Your Service-- "Too Much Information"? Not for the RRFC Network





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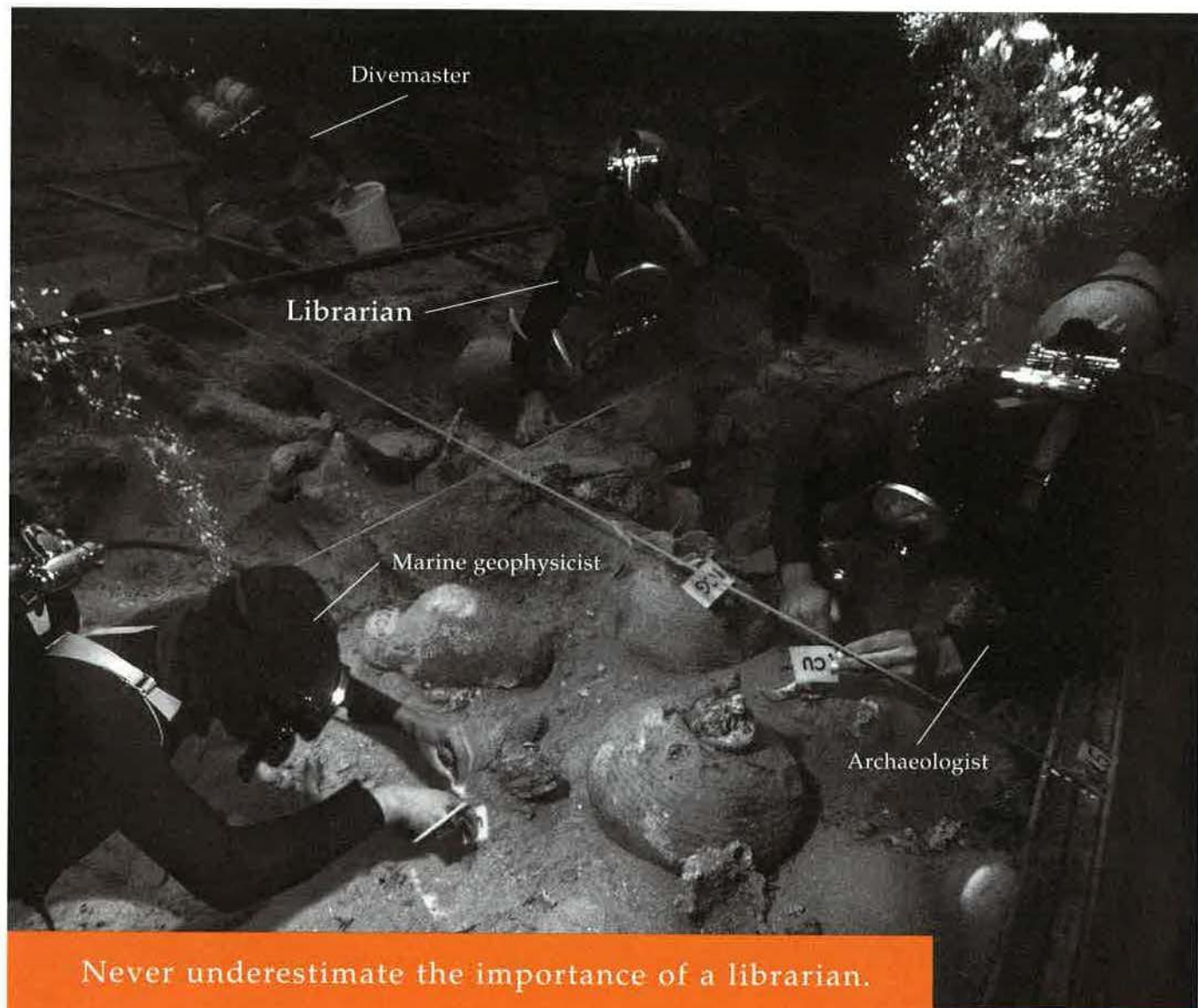
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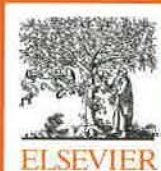
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# executive outlook

## New Beginnings

What an exciting time to join the Special Libraries Association as the Executive Director. I officially began work the first week of July, and already find myself getting valuable information and great ideas from the membership. As I discover more about SLA's rich history and traditions, I realize what an honor it is to serve as your 13th executive director.

My orientation began at the 94th Annual Conference, where I had the pleasure of speaking with SLA leaders, members, vendors, exhibitors and staff. I have received a great deal of support and encouragement from the information community, and I left New York truly impressed by the level of passion and commitment our members and partners have for the association and the information industry.

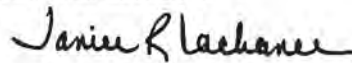
Many of you may already know my background, but for those of you who don't, here is a quick overview. For the past two years, I've been a management consultant with non-profit and membership organizations, specifically focusing in the areas of strategic planning, organizational development/transformation, and culture change. Previously, I was appointed by President Clinton to serve as the Director of the U.S. Office of Personnel Management (OPM), the federal government's independent human resources management agency.

At OPM, with the help of many outstanding federal employees, I was dedicated to redirecting and shifting the agency's strategic direction, and successfully transformed OPM into a flexible, innovative and entrepreneurial organization. As the executive director of SLA, I promise to dedicate those same skills and energies to promote the association's strategic initiatives as well as raise awareness of the professionals we represent and the value they bring to their enterprises.

At every organization that I have been a part of, I have found that people are the most important assets, and in the end, any success lies with them. So I want to recognize Lynn Smith for the wonderful job she has done leading SLA as acting executive director for the past 18 months, as well as the rest of the dedicated SLA staff who have done an excellent job of supporting our members. Their hard work on your behalf means that I am entering a healthy, vibrant, and financially sound organization.

I've come to SLA at the start of a re-branding initiative and in the middle of the 2004 budgeting process. I know I have signed on for a challenging task but it is one that I am very eager to start. In the coming weeks and months, I look forward to meeting more of you in person, during chapter visits and at various conferences. Thanks for making this a great experience!

Janice R. Lachance



Executive Director





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# making news

## sla news

### SLA Members Reaffirm Commitment to Proud Tradition

The Special Libraries Association announced on June 11, 2003, that it is retaining the organization's nearly 100-year-old name. President Cynthia Hill made the announcement at the association's 94th annual conference in New York City, following a vote at the annual business meeting. The vote culminated three years of research, discussion, and brand name debates.

Hill said, "The name Special Libraries Association is a highly recognized and respected brand name in the information industry. It stands for professional excellence, ethics, and best practices in the management of knowledge-based organizations. Our members have always been on the cutting edge, applying information tools and technologies to advance the missions of our organizations. Keeping our name allows us to build on our heritage over the past century while keeping our focus on the expanding information economy of the 21st."

Membership in SLA includes, but is not limited to, chief information officers, knowledge managers, librarians, and web developers. They work in diverse settings such as information centers, libraries, competitive intelligence units, and intranet departments in corporate, academic, and government institutions. They are experts at turning content into actionable information, offering their organizations a competitive advan-

SLA is pleased to present a new series of virtual seminars on career development for the library field: finding a job, building personal competencies, balancing work and life in today's world, and more. The seminars are designed to be of interest to anyone in the library field or information industry.

#### *Job Hunting Online*

October 8, 2003

Speaker: Rachel Singer Gordon, librarian, Franklin Park Public Library; co-author of *The Information Professional's Guide to Career Development Online*; founder and webmaster of [lisjobs.com](http://lisjobs.com); founder of "Info Career Trends" e-newsletter.

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tage and making a direct contribution to the bottom line.

### SLA Announces 2003 Scholarship Winners

Each year, SLA awards scholarships for professional development and graduate study at accredited schools of library and information science. The four winners of SLA scholarships were honored during the 94th annual conference in New York City.

## New Career Development Series

### *Competencies for Info Pros:*

#### *The Critical Balance*

December 17, 2003

Speakers: Cynthia Hill, SLA president and manager, SunLibrary, Sun Microsystems; Rebecca Jones, Dysart & Jones Associates and member of the SLA Special Committee on Competencies.

During the past decade, almost every profession has clarified, documented, and communicated its competencies. Competencies are a specific range of skills, abilities, or knowledge that qualify a person to perform a particular function or carry out selected responsibilities. They are the foundation of a profession. Competencies are also the basis for professional growth and performance measures. SLA's Competencies for Special Librarians of the 21st Century has been revised, further refining and defining the professional and personal competencies critical for library and information professionals. This seminar takes an in-depth look at these competencies and their value to the profession as a whole and to each individual. For registration information, go to [www.sla.org/careerdevelopment](http://www.sla.org/careerdevelopment).

SLA scholarships for graduate study in librarianship leading to a master's degree were awarded to Brian Gray, Kathryn Kennedy, and Jeanie Straub. Gray received a BS in chemical engineering from the University of Akron, Ohio, and has worked in science libraries for eight years. He is enrolled in the joint MSLIS/MBA program at Kent State University in Ohio. Kennedy earned a BA in English from the University of Florida in



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Gainesville. She is a student in the MSLIS program at Florida State University in Tallahassee. Straub earned a BA in journalism from Metropolitan State College in Denver. She is enrolled in the School of Library and Information Science at Emporia State University in Denver.

The SLA affirmative action scholarship for graduate study in librarianship leading to a master's degree was awarded to Laura Ward. Ward graduated *summa cum laude* from the University of San Francisco with a BS in psychology and philosophy. She is enrolled at the UCLA Department of Information Studies.

## chapter & division news

### Two SLA Chapters Launch New Websites

Two chapters have launched new websites. Congratulations go to the Asian chapter (<http://www.sla.org/chapter/cas/>) and the Long Island chapter (<http://www.sla.org/chapter/clis/index.html>) for taking their chapter communications to the next level.

T. N. Prakash, secretary of the Asian chapter, says, "The Asian chapter is one of the biggest chapters, geographically. It is a Herculean task to network this chapter, which is spread over several countries; however, we are determined to make it one of the model chapters of SLA."

Long Island chapter immediate past president Laura Mann met Serena Brooks, a student, at a seminar. Mann's enthusiasm for SLA and the Long Island chapter led Brooks—who was taking a one-week intensive HTML class—to volunteer to design the chapter's website, which she did in two weeks in her spare time, thanks to the practical support of SLA staff experts John Latham and Brian Weisman.

### SLA Kentucky Chapter Presence at African-American Conference

It all began when the Kentucky chapter realized that in order to recruit more African-American librarians into SLA, there first had to be more African-American librarians. According to research conducted by chapter member Reinette Jones, there were only 47 African-American librarians in Kentucky in 1990. Although nationally, African-American librarians make up 7.78 percent of all librarians, in Kentucky they make up only 1.89 percent.

On April 23, 2003, the Kentucky chapter sponsored a booth at the Kentucky attorney general's annual conference,

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"Empowering the Black Community for the 21st Century."

The conference was attended by community and business leaders, students, and educators, and was an excellent opportunity to talk about careers in librarianship to people who could make a difference.

"African Americans are sorely underrepresented in librarianship, both statewide and nationally," said Elizabeth Smigielski, KYSLA director-at-large and librarian at Kornhauser Health Sciences Library at the University of Louisville. "This was an ideal and welcome opportunity to promote our field as a career choice."

The Kentucky chapter will continue its efforts to recruit Kentuckians, especially African Americans, to librarianship by sponsoring booths at career fairs and events in Kentucky. For more information, contact: Susan Brown, [subrown@transy.edu](mailto:subrown@transy.edu).

### Maria Cherrie Wins Travel Stipend Award

Maria Louise Clare Cherrie was honored at the Engineering Division annual business meeting on June 10 with the 2002/2003 Inspec Travel Stipend Award. The \$500 award helps a library school student with expenses incurred while attending the SLA annual conference.



Cherrie is a student at Syracuse University in New York, where she is pursuing an MSLIS. Her winning essay was on the topic "How do you plan to be an innovator in the field of special librarianship?"

### **Biomedical and Life Sciences Division Presents Award**

The Biomedical and Life Sciences Division presented its 2003 Distinguished Member Award to Larry L. Wright, head of reference services at the National Institute of Environmental Health Sciences Library, Research Triangle Park, North Carolina. The award honors his contributions to the profession of special librarianship; his leadership in the division, the North Carolina chapter, and the association; and his excellence as a mentor. A member of SLA since 1984, Wright was the first recipient of the Rose L. Vormelker Award in 1998. He has served on the executive boards of both the Biomedical and Life Sciences Division and the North Carolina chapter and chaired numerous committees, including the SLA Student and Academic Relations Committee. He is a member of the Medical Section of the Biomedical and Life Sciences Division, the Environment and Resource Management Division, and the Gay and Lesbian Issues Caucus. The award was presented at the SLA Annual Conference in June.

### **Business and Finance Division Announces Awards**

The Business and Finance Division announced the winners of its grants and student stipend awards at its annual business meeting in New York. Professional grants were awarded to Mary Beth Bobish, New York State Small Business Development Center, Albany, NY; Hazel Cameron, Western Washington University, Bellingham, Washington; James Cohler, AT Kearney, Chicago;

and Christine Reid, University of Strathclyde Graduate School of Business, Glasgow, Scotland. A student stipend was awarded to John Juricek, UCLA. Each of the five winners received \$1,200 to attend the SLA 2003 Annual Conference.

### **Business and Finance Division's Center of Excellence Award Winners**

The Business and Finance Division announced the winners of its second annual Center of Excellence Awards. The awards, presented at the annual conference in New York, recognize quality in the management and delivery of information. The awards take their inspiration from the Malcolm Baldrige National Quality Awards, which are given annually to U.S. organizations to recognize and promote quality as a critical part of innovation and competitiveness.

The awards recognize the best of the best practices in three categories: technology, management, and service. Any member of SLA may apply for consideration in any of the three categories. This year's winners are the Knowledge Network Group, Microsoft; the Nike Design Library; and Kresge Business Administration Library at the University of Michigan Business School.

The Knowledge Network Group, winner of the technology award, serves 54,000 Microsoft employees globally. Professionals in library and information science, computer science, and journalism work together to achieve the group's mission of connecting people, information, and knowledge for business success.

The group recently reoriented itself from reference on demand to research focused on strategic priorities; its new library portal is designed as a self-help tool to support information

needs. The portal delivers information on a one-to-many model, and a team of research analysts focus on one-to-one relationships with strategic customers.

The judges were interested in the processes and outcomes surrounding the creation of the new portal, especially Microsoft's approach to portal design and the new positions created to support the portal. The planning process—in particular the implementation of the persona model, which resulted in the identification of five key user groups—and the integration of internal and external content were significant and deserving of replication.

The Nike Design Library earned the award for management because of its leadership role for Nike design. In the judges' estimation, the library met or exceeded most Center of Excellence Award standards, and successfully executed its vision and charter by capturing and presenting new ideas and materials in a manner that provides inspiration to its design clientele.

The Kresge Business Administration Library serves the University of Michigan Business School, which was recently ranked number two in the country by the Wall Street Journal. The business school has approximately 856 full-time students and 1,400 part-time students. The judges chose the library for the service award on the basis of the imaginative and relevant services it offers to students, faculty, and staff, such as

- "electrifying content," for example, digitizing career resources to keep them current and enabling students to prepare for interviews regardless of their location;
- leveraging Kresge e-Library licensed databases to lower costs to students for printed course materials and integrating library resources into Web-based course management software;



- “innovative instruction”—partnering with the Computing Services Department to create an online learning module that allows for on-demand learning about the technology environment;
- creating course-specific Web pages that contain library resources and posting them in Web-based course management software;
- digitizing Business School working papers to make them keyword searchable to researchers around the world;
- and creating the position of advanced technologies librarian to offer one-stop shopping to faculty for all their course materials and course technology needs.

The division judges who chose the winners were Jan Chindlund, Pamela Clark, John Ganly, Hal Kirkwood, Pam Rollo, and Donna Scheeder.

## industry news

### GPO and OMB Announce a New Compact for Government Printing

Bruce R. James, public printer of the United States, and Mitchell E. Daniels, Jr., director of the Office of Management and Budget (OMB) jointly announced an innovative agreement that will free executive branch agencies to choose their own printers while saving taxpayer dollars. The agreement will also empower the Government Printing Office (GPO) to maximize public access to federal information.

Daniels said that GPO printed this year's federal budget at a savings of 23 percent. "Federal agencies will now be empowered to select printers that provide the best deal for the taxpayers' dollar," he said. "At the same time, the agreement addresses the long-standing 'fugitive documents' problem, in which roughly half of all government documents do not

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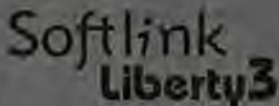

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make it into the federal depository library program."

James added that the new system will "provide the American public with better access to more government information than ever before. The government is now moving the way the private sector has been moving, relying increasingly on electronic

information technology to create and disseminate information products. The agreement we've reached with OMB recognizes this trend by using technology to increase public access to information while providing a system for efficiently managing the buying of the government's declining printing needs, within the framework of current law."



# communications outlook

## Taglines, Slogans, and Bears

### —Oh, My!

By Anthony Blue

A few weeks ago, I was sitting in a branding team meeting at SLA headquarters when the discussion of slogans and taglines came up. I consider myself an educated person, but I was somewhat befuddled when I was asked about the difference between a slogan and a tagline. I always thought they had very separate meanings and were used very differently, but I was wrong. Why are we discussing taglines and slogans? Unless you've been on vacation for a long time, you're probably aware that the association is undergoing a major rebranding initiative. All of its programs, products, and services will be refreshed to deliver a strong, concise, and consistent brand message to its intended target audiences. In a nutshell, this initiative will affect everything the association provides to you.

So what is the difference between a slogan and a tagline? Anyone? Anyone? Okay, I'll tell you. The dictionary says that a slogan is a word or phrase used to express a characteristic position, a stand, or a goal to be achieved; a brief attention-getting phrase used in advertising or promotion; a tagline.

A tagline is a line that serves to clarify a point or create a dramatic effect; a reiterated phrase or message identified with an individual, group, or commercial product and that resonates strongly with an audience: An ending line, as in a play or joke, which makes a point; a slogan.

So the words have similar meanings, and they share many synonyms: byword, catchphrase, catchword, expression, idiom, jingle, phrase, proverb, rallying cry, saying, shibboleth, trademark, war cry, watchword. It could be said that taglines are the long-term phrases and slogans are

used mainly as advertising lines. Slogans and taglines are an integral aspect of a company's identity—they amplify the company's message and serve as the foundation for any marketing effort. Your slogan and tagline should reveal to the world who you are by expressing the core of your brand value. Powerful slogans and taglines play a key role in inspiring trust and expanding your reach into your intended target market.

The Coca-Cola Company is a perfect model of a company that has used great slogans and taglines to articulate and

**"The Coca-Cola Company is a perfect model of a company that has used great slogans and taglines to articulate and enhance its brand."**

enhance its brand. Coca-Cola has been in existence since 1886 and is the number one selling soft drink in the world. For more than 100 years the company has dominated the soft drink market because (1) it makes a great product, and (2) it has great brand recognition and loyalty. Coke has been creating slogans and taglines for its products since 1905—how

many of them do you remember? Does *Always Coca-Cola ring a bell?* What about *Can't Beat the Real Thing* or *Coke Is It* or *Have a Coke and a Smile* or *Catch the Wave*? These are just a few of the company's many compelling slogans and taglines.

These powerful phrases convey a sentiment, an emotion, or an attitude. Coke has consistently proved to the world that the right slogan and tagline will linger in your mind for decades.

FYI: The SLA Board of Directors recently selected Chris Olson & Associates to lead the association's branding initiative. An active member of SLA since 1977, Chris Olson has given numerous presentations and seminars on a variety of marketing topics and issues. For more than 19 years, her company has planned and implemented marketing strategies for information professionals and their services. The Brand Talk column in this month's issue contains additional information on the SLA branding initiative.



# brand talk

## Branding and Marketing Synergy

By Chris Olson

Last month I introduced the Brand Team and outlined the branding endeavors we intend to initiate over the coming months. This month's column provides a snapshot of recent activities and introduces a new section where, from time to time, I will share insights into branding and marketing that may help your communication strategies.

### What Is the Brand Team Working on Now?

We are currently working with designers to develop a new logo that will be the foundation for the visual brand image of the association. We have created the graphic symbol and logotype, and are developing color palettes that incorporate the latest research in international color trends. We expect to unveil the new logo at the Leadership Summit in Albuquerque, New Mexico, in January 2004.

We are working closely with the Public Relations Committee to identify and pursue opportunities for committee members to help with branding endeavors. The Brand Team recognizes the rich resources and expertise our members offer, and we have begun to identify people who can lend their knowledge and insights to our branding activities. On the drawing boards is a program session for the 2004 Nashville conference and a fresh approach to International Special Librarian's Day (ISLD).

Our president, Cindy Hill, has invited three members to form a short-term task force to recommend a tagline for our association. The tagline and logo will be trademarked to protect our brand in any legal challenges.

An important component of our branding initiative is a resource document called Special Libraries Association Brand Identity Guidelines. This document gives the parameters for using the logo, tagline, and graphics, and covers messages and other considerations for managing a consistent and coordinated brand across the association and its units. The guidelines have been outlined, and we are fine-tuning them. Although I refer to the guidelines as a document, they actually will be a series of Web pages and electronic resource tools on our association website. The Brand Team will provide a working preview of the Identity Guidelines at the Leadership Summit in January 2004.

Our association website is among the numerous products and services that will be affected by the application of our new brand. Members of the Brand Team are working closely with the staff responsible for the website, coordinating our efforts and schedules. When the new logo is unveiled, the redesigned website will also be released, sporting the new logo, graphic design treatments, and color palettes.

### What's Next?

Our plans include revamping the website press room, transforming it into an electronic press room, complete with all the resources and information tidbits media writers have come to expect from virtual communication centers. This will require a significant level of effort from the Brand Team, as we evaluate current press room resources, identify a new architecture and navigation for press room content, and update and compose new communications materials. The end result will be an electronic press room that will serve the needs not only of the information industry press but also of members of the business and industry media we intend to target later in our brand message broadcasts.

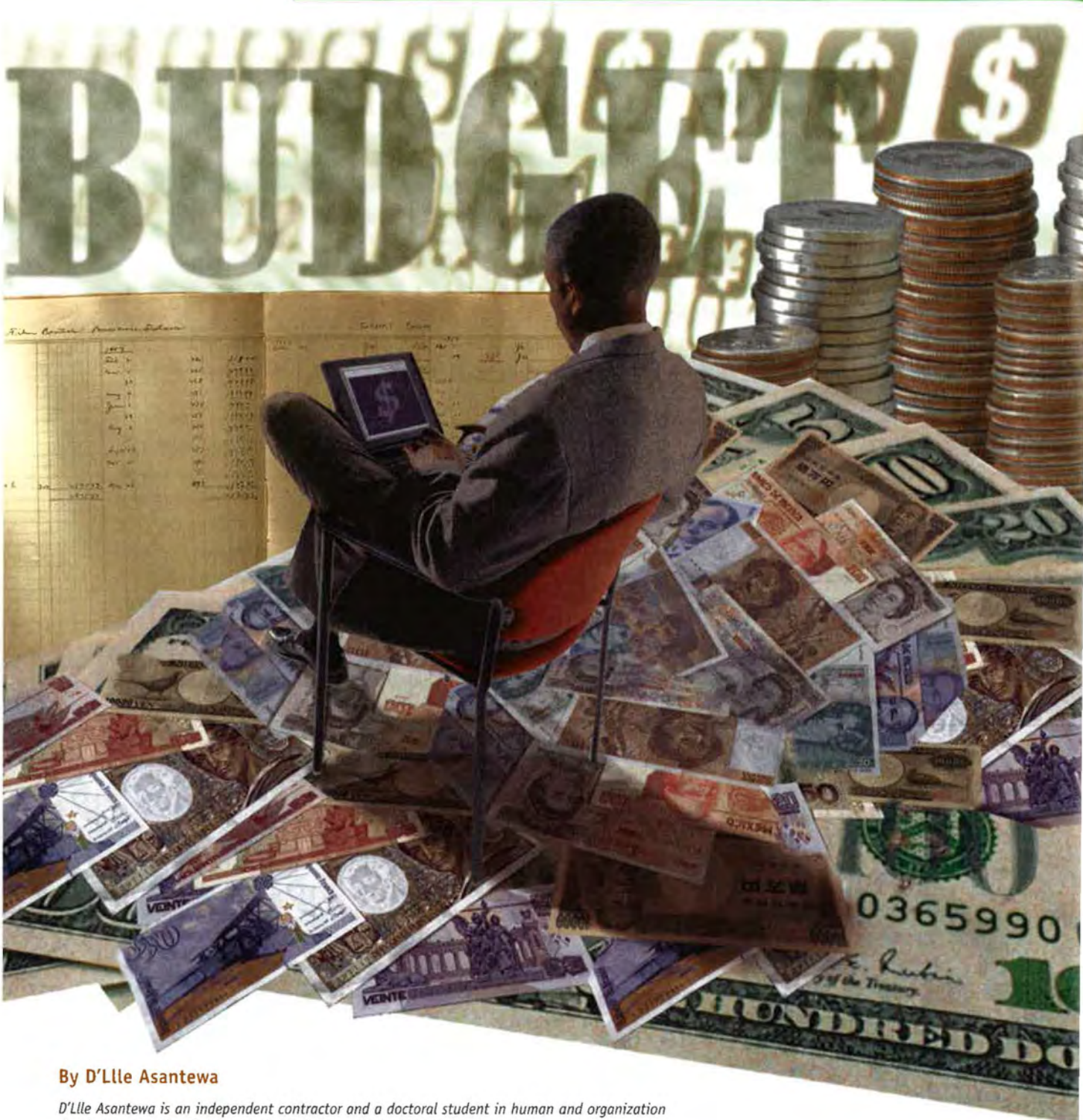
### Brand Thoughts

Many Brand Team activities can be translated and applied to branding initiatives for information services—albeit on a smaller scale. From time to time, I will highlight branding concepts that I think may be useful. For example, take the relationship between marketing and branding. Many people think branding replaces marketing, but that's not true. Branding is a component of marketing. Remember the marketing mix? The five P's: product, price, placement, promotion, and public relations. Branding is actually part of public relations. Years ago, communications was only concerned with how a logo looked on letterhead and signs. That focus expanded when an organization's brand image was recognized as contributing real value to the bottom line. As the impact of a brand on customer purchase decisions became understood, brand management had a greater impact on marketing activities. Today marketing is still concerned with product management, positioning, and market segments. But now there's a branding dimension as well: How does the product fit within the brand? What marketplace position is represented by the brand? And who is the target of brand messages? So branding hasn't replaced marketing; rather, it works in tandem with marketing management strategies. As we lay out the association brand over the next months, we will also be establishing the foundation for an association marketing strategy and the synergy that bonds branding and marketing.

Contact Chris Olson at [BrandTalk@sla.org](mailto:BrandTalk@sla.org).



# Holistic Budgeting: A Process



**By D'Llle Asantewa**

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## ... A Whole System Approach

**"HOLISTIC \H-'LIS-TIK\ ADJ (1926) 2: RELATING TO OR CONCERNED WITH WHOLE OR WITH COMPLETE SYSTEMS RATHER THAN WITH THE ANALYSIS OF, TREATMENT OF, OR DISSECTION INTO PARTS." (MERRIAM-WEBSTER'S COLLEGIATE DICTIONARY)**

Specialized libraries are usually embedded in and supported by a diverse group of parent organizations: federal, state, and local governments; corporations; academic institutions; and associations or other non-profit organizations. Because so many organizations are represented in the specialized library field, budget formats vary widely, but most libraries prepare one every year.

Articles on the technical aspects of budgeting can be found in SLA's Information Outlook and other library publications. This article will examine the theory and reality supporting holistic organizations, their libraries, and their budgeting practices. Program budgeting has a closer affinity to holistic practices than do line item or performance budgets, and it is the program budgeting perspective from which this article is written.

Budgets are called by various terms: operating plan, planning tool, policy tool, medium of communication, and means of control, to name a few. What budgets do is allocate limited financial resources to competing organizational units. Many budgets also set standards against which actual performance is compared, thus revealing how effectively objectives are being met.

### **The following are some functions that budgets serve:**

**Communication tool.** A budget communicates to staff the reality of available resources—human, technological, and financial. It also communicates the objectives that staff helped develop and committed to meet.

**Planning tool.** A bottom-up approach to planning is organizational learning in action. This is where staff buy into the planning and budget process and commit to working toward the fruition of their efforts and talents.

**Contract.** This is a binding agreement between senior management and the rest of the organization, a promise to allocate a determined amount of money to the library for agreed-upon objectives (Urban Institute and Metropolitan Research Institute, n.d., p. 5).

**Major policy tool.** How you, as a decisionmaker, spend

your organization's limited resources is "perhaps the most important policy decision you will make during a fiscal year" (Urban Institute and Metropolitan Research Institute, n.d., p. 6).

### **The Holistic Approach**

Holistic preparation of a budget focuses on the many aspects of the environment (see below) and of the library itself that will be affected. Holistic budgeting not only brings different parts of the library together, it concentrates on the interactions among those parts. The holistic approach is about organizational archetypes behind an event rather than about the event itself; about contradictions and inconsistencies and schisms and divergences rather than just trying to fix a situation; and about depending on principles of leadership in addition to theory and accepted social truths (McNamara, accessed June 13, 2003).

The holistic approach to budgeting is to engage people in the process from all parts of the system: library support staff, who may have a broad knowledge of operations but feel left out; end users, for their input and support for your purchasing decisions; your finance department, so they can learn what you need; reference staff, who may feel frustrated because important information sources are not on hand; technical services staff, who often need systems upgrades to process materials more efficiently; and vendors, so you can negotiate for discounts and multiple format purchases (Seer 2000, pp. 190-192).

A holistic approach to budgeting involves the entire organizational system. This leads us to consider concepts popularly known as internal and external environments. If we think of internal as the library itself, external would be the parent organization outside the library department. Further away, but still in the external environment, would be forces such as legislation, the economy, technological change, and competition, which affect both the parent organization and the library. Using this model, major problems that affect libraries can come from the external environment as well as from the library itself.



Chilean scientists Humberto R. Maturana and Francisco J. Varela argued that organizations' environments are not defined as internal and external; rather, everything that contributes to an organizational system's detriment or to its functioning is part of its environment, and all interactions affect the environment as a whole (Morgan 1986, pp. 236-247). Applying this model, the system would include vendors and suppliers, legislation, technology, and economic conditions. In many geographic locations, even the weather would be a recognized force. Libraries that subscribe to this model would be alert not only to the effects that the environment has on them, but how they in turn affect the environment. These libraries, rather than being reactive, would proactively facilitate change to the broader systems in which they operate.

### Change Processes

Beckhard and Harris (1987, pp. 2-7) pose six key issues that challenge managers in the midst of institutional change. It is important to recognize the ways in which organizational change is crucial for libraries, for holistic budgeting incorporates input from each of these change issues:

#### Changing Shape

"In response to increased worldwide competition, dramatic growth of technology, and rapidly expanding patterns of takeovers, mergers, and restructuring, many organizations have to transform their own shape" (Beckhard and Harris 1987, p. 2). The library, as part of a larger institution, cannot remain static as its parent organization changes. Conversely, the library can initiate change that brings about organizational transformation. Libraries have a different "shape" today than they did 15 to 20 years ago. Then, card catalogs were the norm; now, personal computers dot internal landscapes. Library services may have been free then; now, user fees are assessed to departments. Then, the first person who greeted the client was probably a professional librarian; now, that worker probably has not earned a Master of Library Science degree. Increasingly, libraries are becoming paperless—relying on online resources for information. The words "library" and "library school" were self-descriptive. Now terms such as "information center," "information services center," and "school of information sciences" are used. Libraries have not remained stagnant.

#### Changes in Mission

A library that is sensitive to ripples in its environment

will react accordingly and change in tandem with the environment; or it may anticipate environmental changes and be prepared. Organizations that ignore or are not aware of their position in a changing market cannot sustain business. Libraries' mission statements may change to reflect either the narrowing of focus on a market or an expansion based on the breadth and diversity of a conglomerate. As the mission changes, so will the budget.

#### Changes in Ways of Doing Business

Environment, both external (economic, legislative, technological) and internal (profits, staffing, funding) move library personnel to market their expertise through differentiation of services. Libraries are competitive with the Internet at the same time they use its technology. As budgets shrink and demands for services increase, libraries are making more use of technology: networking, desktop Internet access, electronic catalogs, and Web access to journals and electronic databases. Some libraries have become entrepreneurial, and the trend is spreading.

#### Changes in Ownership or Administration

The prospect of a change in ownership or administration can be cause for anxiety. A merger or acquisition can substantially increase the budget if there is an increase in information needs; reduce the budget by cutting back on information services; or eliminate the budget altogether by eliminating the information function. Library managers must do their research and lobby with understanding senior administrators and with end users. Budgeting is difficult enough when the economy is stable or growing, but libraries are experiencing the consequences of economic ups and downs, cutbacks resulting from parent organizations' financial losses, and the insecurity that accompanies industry wide job loss.

#### Downsizing

Hard economic times change things; library funding is reduced, professional and support staff are cut back, programs are eliminated. Clients still require a certain range, delivery, and quality of services, so library management looks to information and communications technology to satisfy information demands. Initial expenditures for technological improvements may seem staggering, but in comparison to staff salaries and benefits, the outlay is generally considerably less. Also, the costs of salaries and benefits are repeated each year and tend to increase, while computer technology (except for online subscriptions) tends to be an occasional cost that decreases over time.



### *Changes in Organizational Culture*

Organizational culture change affects budgets in ways we might not have envisioned 20 years ago. For example, benefits offered to couples regardless of marital status or gender will increase budgets.

Prentice (1983, p. 58) cites the human factor in budget preparation as a problem because of people's resistance to change. Leadership plays a big role in the change process. When workers are recognized as stakeholders and are involved in the process, and when their input is valued for improving their own jobs and their work environment, resistance begins to break down (Prentice 1983, p. 58). Not all resistance is inherently negative. Try to get at the root of the resistance, and you might find constructive input that supports the change process. Is this the process for a library to become a learning organization? It depends on the extent to which library leaders can successfully build a setting of mutual trust and system wide participatory engagement, in which all workers contribute to the common growth. "A common characteristic of all learning organizations is that they view their people as...people" (Mellander 1993, p. 189).

### *Getting to Budgeting*

Suppose we embrace a holistic approach and invite all involved to the budget planning table. A fundamental consideration is "When do you need everybody in the organization to be involved in an event, and when will a critical mass of stakeholders do?" (Bunker and Alban 1997, p. 152). An adequate response might be "It depends." We must consider the breadth of our environment, the stance of our parent institution, the amount of available time, and the magnitude of people involved. "[O]ur whole approach...has not been one of imposition or laying on, but of working with people and bringing things out. And so we first bring out the people's views of the problems as they're real to them in the everyday work situations. We explore with them their attitudes in relation to those problems—how they contribute to them and affect their own work. Also, we look at that in terms of their colleagues in other areas—how those relationships might be affected.... So, we've been approaching it in a way that we've been creating ownership of the problems and, consequently, the solutions are emerging. ...The next area has to do with budgeting basically—obviously, budgeting should fit what you're planning.... And so we're looking at program budgeting as another concept that seems to make sense" (Fletcher 1990, p. 36).

As allocations decrease, budgets reflect both external and internal environments. As goes the environment—"the

world out there"—so goes the organization, and along with it goes the specialized library. Using the Maturana and Varela model (Morgan 1986, pp. 244–245), library leaders bring the "world out there" inside—the library extends the boundaries of its environment. Rather than waiting to see what will happen, library leaders involve the wider system by either changing with it or countering it, then trying to shape what happens. The library is not passively acted upon because it perceives itself as an active environmental component.

What happens to a budget during difficult financial times? Not every organization's economic woes are caused by a weak economy. Unwise marketing strategies, poor business decision making, and consumer behavior can trigger bottom-line havoc. Under any circumstances, when the parent organization's income (or funding) falls short of expectations, the shortfall is passed along to divisional and departmental budgets, a process generally labeled as cutbacks. Bankruptcy filings by airlines, major retailers, telecommunications giants, and financial services companies account for big dollar losses in the economy. While each dollar spent nourishes the economy, the converse is also true: every dollar lost sends a negative ripple throughout the economy.

Symptoms of budget cutbacks can be seen in the workplace in increasing workloads, elimination of support staff, hiring freezes, across-the-board layoffs, and low worker morale. Let's look at some news topics and some comments about the situation. Notice the human concern as librarians do their best to maintain the integrity of service.

"As library staff sizes continue to shrink and budget pressures mount, libraries of all types are clearly doing more with less. Library functions have reacted to this dynamic in a number of ways, including refining the definition of their priority service markets; developing technology-reliant one-to-many information solutions; increasing user self-sufficiency; and redeploying staff and broadening job descriptions of library workers" (Strouse 2003, p. 14).

"We had to grapple. We tried to keep staff, but in the process our collections budget suffered. We reviewed spending on a quarterly basis, and if anything was left over, we used it for collections. That was not the best way to go because we needed to keep up our journal acquisitions. We began to build a hole from which the libraries may never recover, for we needed to keep up our journals. We tried to salvage the periodicals budget, but five-year gaps were hard to put back together.



I recommend looking at staffing and insisting on three-, six-, and nine-month reviews and considering alternatives to letting staff go, such as trying position sharing" (B. Perry, former assistant director, research and collections, Smithsonian Institution Libraries, personal communication, April 8, 2003).

"External factors weigh in the budgetary process to the extent that they affect the overall financial picture of the university and, thus, affect the library's budget.... The worsening economy, stock market volatility, the war in Iraq have all negatively impacted the university's financial picture and will likewise affect the library's 2004 budget" (D.C. Maratos, librarian, Montgomery County Campus, Johns Hopkins University, personal communication, April 4, 2003).

"Budget Woes Could Close Specialized Libraries at Dartmouth" (Library Journal, October 23, 2002).

### Program Budgets

Traditionally, a line-item budget focuses on expenditures (salaries, equipment, and supplies), while a program budget emphasizes expected results in major program areas (services and activities) and calls attention to long-term, organization wide strategies and objectives by linking them to revenues and expenditures. A program budget allows leaders to make informed decisions regarding organizational goals.

A program is a hierarchically classified arrangement of major activities that support the strategies and objectives of the library, which in turn support the information needs of the parent institution. Here are some advantages of a program budget (Urban Institute and Metropolitan Research Institute n.d., p. 10):

- It produces an easily understood document. A program budget shows organizational support in a format that facilitates whole-system understanding of the budget's intent and of the services the library offers.
- It emphasizes library goals, needs, and capabilities. A program budget can align library objectives with the financial ability to support them.
- It achieves optimum use of the budgetary allotment by emphasizing informed planning and management decisions. A program budget serves as a guide.
- It serves total organizational interests. Input and feedback from the whole system contributed to the preparation of the budget. The approved budget reports back to stakeholders who participated in the budget planning process, and informs them of approved programs and services that affect their organizational interests.
- It encourages combining services for the sake of efficiency.

A program budget makes optimal use of limited resources by minimizing conflict and overlap among projects.

An approved budget is a final product. It reflects the whole system's efforts to express perceptions of how to make the most of organizational strengths and opportunities, how to strengthen organizational weaknesses, and how to ward off threats to the library community. Senior management has approved a document that is management's financial agreement with staff.

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# Reference and Instruction Services Go Virtual as a Form of Outreach: Case Studies from Academic Libraries



**By Clara R. Williams  
and Tyler O. Walters**

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## ••• The New Virtual Environment

**ACADEMIC, SPECIAL, AND PUBLIC LIBRARIES CATER TO A CUSTOMER BASE THAT IS NO LONGER DEFINED BY LOCATION. USERS OF INFORMATION ARE GLOBAL CLIENTS WHO ARE CONTINUOUSLY CONNECTED TO RESOURCES AND ARE NOT RESTRICTED TO ACCESS IN ANY PHYSICAL FACILITY. CONVERSELY, UNDERSERVED LIBRARY USERS, THOSE WHO LIVE IN IMPOVERISHED COMMUNITIES, RARELY VENTURE INTO LIBRARIES TO MAKE USE OF INFORMATION RESOURCES; NOR DO MANY HAVE PERSONAL COMPUTERS TO ACCESS RESOURCES REMOTELY, SINCE MANY CONFRONT ECONOMIC, SOCIAL, OR EDUCATIONAL CONSTRAINTS.**

But underserved users may also include college and university students and faculty who do not recognize the value of visiting their campus library, either electronically via the campuswide intranet or in person, and who may choose instead to consult favorite resources on the Internet or personal collections in colleagues' offices or friends' dorm rooms. These students and faculty are missing out on many new resources packaged in a variety of user-friendly media. If they are made aware of the many products and services available to them, they can begin an "information journey" to explore online resources of value to their work and professional and personal interests. Present-day academic libraries, in particular, offer top-notch electronically designed outreach programs. They demonstrate how libraries have become high-tech data mining services, information training and navigation centers, and experts in developing high-speed resource sharing and document delivery systems, connecting users to pertinent information via customized, Web-based research portals.

Two outreach activities, hosted on library websites and well-received by faculty and students alike, are the "online reference desk" or "virtual/digital reference," and "online/virtual instruction." This article discusses these popular information services as representative outreach programs and describes how they operate at academic institutions. The Institute of Paper Science and Technology's (IPST) Haselton Library and Knowledge Center, in Atlanta, Georgia, is the main case study presented. The IPST is a graduate school and research institute that supports scientific research and business studies for the paper industry. The Haselton Library is an intriguing case study, as it functions both as an academic and special library, serving the Institute's 25 faculty, 67 students, and approximately 50 research staff, as well as a global corporate clientele

involved in the pulp, paper, and related industries. One full-time library manager serves as the information consultant and instructor of library services, with a support staff of a digital resources coordinator (who designs and manages the library's intranet resources) and four paraprofessionals (who handle cataloging, document delivery, interlibrary loan, and serials management). To develop and benchmark its information training program, the Haselton Library selected applicable performance standards approved by the Association of College and Research Libraries (ACRL) and published in *Information Literacy Competency Standards for Higher Education* (January 2000). The results of the benchmarking are included in this article.

### Outreach—An Introduction

"Outreach" has been defined as "bringing services out to where they are needed" (Trotta 1993, p. 1). The origin of outreach programs can be traced to public libraries, where library branches and bookmobiles served the information needs of the communities (Trotta 1993). Academic outreach, on the other hand, is a relatively new phenomenon and may have a variety of functions (Cruikshank 2001). For example, at the University of Michigan in Ann Arbor, outreach has been characterized as the design of services to reach patrons outside the library, whether undergraduates in their dorms or faculty in their departmental offices (Cruikshank 2001). Faculty outreach in an academic setting is necessary for several reasons: (1) faculty may introduce new bibliographic and information-seeking concepts; (2) faculty are a particular and primary group of information seekers for academic libraries; (3) faculty are information gateways to student library users, which is the largest user group for academic libraries; and (4) working directly with faculty is a crucial aspect of the changing role of information professionals (Lipow 1992).



Faculty can generate enthusiasm for research service initiatives and influence the use patterns of students, which will result in improved information-seeking skills and increased use of library resources. In addition, library staff can coordinate and nurture instructional partnerships with faculty and students from which both prosper intellectually.

In building a strategic alliance between faculty and library, it is common to find an outreach librarian on staff—someone whose time is devoted to developing programs for faculty, students, and researchers. At George Washington University in Washington, D.C., the faculty outreach librarian coordinates brown bag lunches and makes “house calls” to key administrators to demonstrate services (Cruikshank 2001). Librarians also design websites as outreach tools, opening access to numerous products and services through a variety of user-friendly portals. Increasingly, academic libraries use the Web as a platform from which they can provide one-stop access to a dynamic platform of electronic resources and services (Lilly and Van Fleet 1999). Internet-based technologies greatly enhance the ability of libraries to meet their outreach goal of “bringing services out to where they are needed.”

Further evidence of outreach efforts can be found in the interactions between the reference librarian/information consultant and the user as they transact in cyberspace; this is very different from the traditional reference desk, which functioned as a service point for the face-to-face “reference interview.” The interview gauged the interests of the end user through ongoing dialog with the librarian to explore relevant resources. The online reference desk supports the same kinds of customer-focused research initiatives, but it is an integral part of the new virtual library—a library without boundaries, transcending the four walls and serving customers anytime, anywhere.

Customers of online reference services are found in academic settings, corporate environments, public libraries, and home-based operations. Their need for information is continuous, although professional research staff usually respond during business hours: 7:00 a.m. to 6:00 p.m., Monday through Friday. Using collaborative software, these customers can communicate with each other and with information professionals to assess relevant resources that match their areas of interest, whether the publications are in full text on the Web, in digital format via the library’s online catalog, or in the library’s extranet, an external portal of licensed resources usually restricted to defined users. Online reference is in demand and has become one of the most popular outreach services in today’s academic libraries.

## Model Programs

The real-time/live-online reference services of some academic libraries serve as models. In September 1999, no more than five libraries had implemented any kind of live virtual reference service, or even knew what that was (Coffman 2001, p. 149). Because of the nature of these services and the global customers they serve, whether in an academic or public library setting, online reference is a form of outreach. Library public services are being reengineered to think less of services associated with location and focus more on services that can be performed both electronically and in locations remote from the library building (Snowhill 1996). North Carolina State University (NCSU) Libraries, for example, launched its real-time online reference service on January 8, 2001. In 2001, NCSU had an estimated 1,200 distance learning students, some of whom would never visit the library (Boyer 2001, p. 122). Using the Virtual Reference Desk produced by Library Systems Services LLC, staff were able to evaluate the live online reference service and note a few areas for improvement, such as how best to handle multiple simultaneous live requests, the need for expanded hours, and a reexamination of the design of the library websites and catalogs to help patrons who will not ask reference questions, but may use online reference services (Ciccone 2001).

The Haselton Library and Knowledge Center of the Institute of Paper Science and Technology responds to its global customers by offering a wealth of information resources online and creating access via customized portals. Where resources exist, services are needed that support information users in seeking, locating, navigating, and using these materials properly. The library constructed a program of activities to bring its global clients up to speed on using online information resources and provide them with online reference support and research assistance. The clientele were employees of the paper and related supporting industries, scientific and technical users, management, and faculty and students of the Institute.

The Haselton Library began its implementation of virtual reference by investing much effort into responding to reference inquiries via the Internet through the IPST Member Channel (an extranet application accessible only by IPST’s many global research partners and supporters); the Institute’s “Inside IPST” intranet; and its public website ([www.ipst.edu](http://www.ipst.edu)). A generic e-mail address ([info.support@ipst.edu](mailto:info.support@ipst.edu)) was established and links to it were provided on the websites. In the beginning, the means by which users communicated reference inquiries changed rapidly—quickly converting mostly to e-mail activity. It did not



take long for customers to catch on to using the e-mail reference links between 7:30 a.m. and 6:00 p.m., Eastern Time, Monday through Friday. Responses are generally made within the same business day.

Additional outreach efforts include an annual open house, coordinated to demonstrate new products and services and provide real-time virtual reference assistance; hands-on sessions; and library tours. An open house event can strengthen a library's outreach potential (Odom and Strout-Dapaz 1999). Through the open house, libraries can identify potential customers, while existing customers appreciate the opportunity to share their thoughts on product improvements and information needs. These activities require that library staff work together to prepare the customer to be information-ready.

As part of the overall program to bring online information resources to the global IPST community, the Haselton Library helped the Institute develop Web portals for specific clients: the IPST Member Channel, the "Inside IPST" intranet, and the IPST public website. These sites bring an array of online resources and service points to customers. Most of the licensed online resources are in "Inside IPST" for the benefit of internal customers; some are provided through the Member Channel, making them directly available to employees of supporting companies and research partners. Other than the library catalog, no online information resources are currently available on the public website. Each of the three sites has a full array of access points to the library's public services, such as reference, research assistance, document delivery, inter-library loan, a translation service, and other forms of support. The work of the library extends beyond simply maintaining the library portion of these sites; in fact, the library serves as designer, information architect, and content manager of these three sites for the entire Institute. In this way, the Haselton Library has been an example of the changing role of libraries in the world of information and its users—as a Web-based information architect as well as an instructional partner to faculty, an information navigator, and a teacher of the Internet.

The Web portals were designed to provide access to online resources and search mechanisms for clear, logical navigation of sites. Site navigation is an information-seeking activity practiced by librarians with training in information architecture, adding value by improving the navigability of the site and thus users' ability to locate information. Electronic resource management is also a key role, coordinating the licensing of and online access to e-journals, databases, the library catalog, commercial and in-

dustry-related information portals, and relevant government, nonprofit, and corporate websites. Information consultants created the Directory of IPST-Reviewed Links, selecting, reviewing, and describing websites of potential interest to the IPST community. The directory filters out the best and most relevant websites, categorizes them, and provides links to them for end users.

Through these activities, the library's public services are offered to all its clientele: local and global; academic, corporate, and industry-related. In approximately three years, the Haselton Library went from delivering access to two electronic resources to delivering more than a thousand online resources. To accomplish this, the library conducted a massive examination and overhaul of reference, instruction, and end user behavior patterns.

The information consultants at IPST established information-sharing alliances with their counterparts at the Georgia Tech Library and Information Center of the Georgia Institute of Technology. The professionals collaborate on current library practices for such services as inter-library loan and joint access to electronic journals and databases. The Georgia Tech Library offers virtual reference through its "Real Time Reference" and "Ask a Librarian" options. "Real Time Reference" is available during library hours. Information consultants respond to questions in real time, offering assistance with brief reference questions only. The service uses AOL's Instant Messenger software. "Ask a Librarian" is an e-mail reference service. Information services staff respond to questions within one business day, seven days a week. The Georgia Tech Library is in the process of reviewing new, more advanced software to replace its present service.

Cornell University Libraries also developed digital reference initiatives for 2000–2002. The planned focus was to provide around-the-clock access to high-quality digital reference services from anywhere, with reference service as a key component of the digital library and digital reference as a "high-tech and high-touch" service (Saunders 2001, p. 16). In-person reference transactions dropped significantly at Cornell as users expected digital services 24 hours a day, seven days a week. In the Cornell initiative, staff noted that there is a lot to learn about user behavior, user needs, and cost models as libraries develop new models of service and redefine their definitions of primary users (Saunders 2001).

In examining online library instruction programs, we find related initiatives in place at most academic libraries, which have been transformed over the years to offer a



variety of self-paced programs via library intranets. In the real-time online library instruction program at the Florida Distance Learning Reference and Referral Center (RRC), the "chat room" environment serves as a virtual classroom. The RRC uses Conference Room Professional Edition by WebMaster to allow users to communicate as they move from one room to another. Prewritten scripts and additional staff are also used (Ciccone 2001).

Another model instruction program is the information literacy program at the Haselton Library and Knowledge Center of the IPST, launched in August 2001. Instruction was revamped to include specific instructional modules to improve the skills of faculty and student in online information seeking, navigation, and use. The program consists of weekly drop-in clinics, workshops, and brown bag lunch sessions that cover areas such as Internet searching, reference tools, e-journal use, database search strategies, and the library's reviewed links to websites. Users can participate in these programs from their desktops, if they prefer, without ever leaving their offices or classrooms. The team leader prepares discussions on a variety of topics, including the items already mentioned, library policies, CD-ROM products, the library's digital collections of IPST-produced research reports and papers, and the statewide GALILEO system (Georgia Library Learning Online). The program also includes a discussion of the Georgia Tech Electronic Library (GTEL), as IPST is an Internet domain on the Georgia Tech campus and has full Web access to the online resources of the Georgia Tech Library.

Online tutorials were also created to direct users to instructional guides for book renewal, Internet searching, database search strategies, reference tools, and WebCat. Links to online tutorials at other libraries are also provided. One excellent tutorial for Internet-savvy searchers is the Teaching Library at Berkeley (University of California at Berkeley 2003). Sample topics are What is the World Wide Web?, How Do I Connect to the Internet?, and Using Search Engines. Users can choose the tutorial that best matches their Web interest and knowledge level.

The Haselton Library team leader facilitated an evaluation of each participant's performance for specific learning abilities, related to the use of multimedia resources available in the library. Preselected standards, extracted from Information Literacy Competency Standards for Higher Education (Association of College and Research Libraries 2000) were used to measure participants' research skill proficiencies. The team leader selected standards 1, 2, 3, and 5, which cover applicable performance indicators and outcomes characteristic of the IPST user. Following are

evaluative summaries for each selected standard based on observations and discussions with IPST participants in clinics and point-of-service interactions. Each summary focuses on end user applications of the following information-seeking skills: database searching, Internet searching, Information Gateway navigation, electronic journal access, IPST Reviewed Links access, WebCat navigation, and reference material use. The learning environments include instruction clinics and point-of-use interactions. The statements apply to the participant groups rather than individuals.

### Haselton Library-Information Literacy Program Evaluation Statements

*Standard 1.* The information-literate student determines the nature and extent of the information needed.

Most participants had performed preliminary research on topics related to coursework, having already conferred with advisors, and some were involved in ongoing research projects. The review of published literature for research topics—which includes accessing databases, the Internet, EBSCO host, and other resources—was a primary discussion in clinics and point-of-service interactions and was a major concern of end users. Most participants had reviewed their favorite relevant sources before attending clinics. Some had consulted with their instructors or the information consultants to gauge preliminary findings. As a practice, the team leader reviewed popular industry reference resources, both print and electronic. All participants could articulate their research interests. Participants had preselected keywords for literature searching; however, most had not consulted the *Thesaurus of Pulp and Paper Terms* and were not familiar with it as a resource for keyword strategy development.

Since the majority of participants use both print and electronic resources, the team leader discussed the value and difference of a number of information resources in a variety of formats. Participants were not aware of basic criteria for judging the quality of Internet material and resources, and they were not familiar with reliable websites that offer guidance in Internet use. The new IPST Digital Collections was introduced to users through announcements and special clinics organized by the digital resources coordinator. With regards to user services, participants who had been at the Institute longer than a year were familiar with interlibrary loan and translation services. They were familiar with WebCat but not some of the newer search options. All participants were interested in learning about new resources if those resources supported their research endeavors. Those who need resources for projects and coursework generally agree to pay fees, if necessary, to get copies of articles and book loans. Participants were



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familiar with general publishing procedures for authors, such as "instructions to authors" guidelines and deadlines. Additionally, they expressed an interest in keeping abreast of new technologies in information organization and access.

**Standard 2.** The information-literate student accesses needed information effectively and efficiently.

PaperChem, PIRA, SciFinder Scholar/Chemical Abstracts, AGRICOLA, and Current Contents are some of the most popular industry databases available for subject literature searches. Users were briefed on the scope of each. GALILEO and GTEL databases were also discussed in clinics, as users were not thoroughly familiar with these services. Participants used a number of sources to select appropriate search terms to retrieve relevant citations. The *Thesaurus of Pulp and Paper Terms*, for example, is widely consulted throughout the industry for keywords used in PaperChem; however, users were not thoroughly familiar with it as a resource. Other databases, accessible through Dialog and the Scientific Technical Network (STN), provide other thesauri related to the subjects covered. Most participants had used the earlier version of PaperChem, but were not familiar with the new Paper Village 2 product. Construction of search strategies, using Boolean, truncation, and other search techniques, was not a proven skill among participants. Most participants had attended the Open House and/or met with the information consultants for guidance, but were not confident searchers with Boolean and other techniques.

Additionally, most participants indicated that they do not routinely keep abreast of databases available to them through Haselton. End users rely on the information consultants to tell them about new and relevant resources. Participants were aware that online database services are available through Haselton, and end users routinely rely on the information consultants to offer guidance and run literature searches for them or to direct them to relevant resources. They were not familiar with all the databases through GTEL, GALILEO, Dialog, and STN. Users were somewhat familiar with EBSCO Online's "journal search" but were not adept in using the "article search" option. Most participants were familiar with other library services, such as interlibrary loan, document delivery, translations, and WebCat. Library policies and staff contacts were shared with end users new to IPST. Institute-wide announcements alert users to new products and services and to changes that affect access. Participants were capable of refining search strategies by modifying keywords, but needed assistance from the team leader. In some cases, a broadening or narrowing of search terms was needed to improve retrieval. Participants were also interested in limiting by qualifiers, such as publication year, language, or document type.

**Standard 3.** The information-literate student evaluates information and its sources critically and incorporates selected information into his or her knowledge base and value system.

As most participants were graduate students and faculty, thinking critically about resources was quite common. However, locating quality resources on the Internet was not widely practiced. The team leader drafted special handouts addressing Web-searching issues and suggesting quality selection criteria for Internet resources, as most users were not familiar with screening techniques used to select top-quality resources in the vastness of the Web. Checking source authority, for example, is important to guarantee the accuracy of information retrieved.

**Standard 5.** The information-literate student understands many of the economic, legal, and social issues surrounding the use of information, and accesses and uses information ethically and legally.

Participants appeared to be cognizant of the proper use of Institute resources and services. Periodically, IPST's IT group e-mails reminders with regard to proper use of equipment and so on. Popular industry business-to-business (B2B) and e-commerce sites were discussed; Paperloop.com and ForestWeb, for example, offer useful industry information to both subscribers and nonsubscribers. Dialog and STN information services, commercial fee-based services, were also covered. Copyright issues were covered briefly, including a discussion of Haselton's TRS account with the Copyright Clearance Center (CCC) for photocopy activities. IPST's general counsel is also consulted for intellectual property matters. Participants were aware of the various style manuals IPST recognizes beyond its own—those of the American Chemical Society (ACS), the American Psychological Society (APS), and the Modern Language Association (MLA). With minimal instruction, participants demonstrated proper login procedures to access e-journals and databases. Participants were directed to "use restrictions" on the library's intranet pages for e-journals and databases. It has been a proven practice for end users to contact Haselton staff for specific questions about access to resources. Additionally, IT sends out Institute-wide e-mail reminders to internal users regarding compliance guidelines. IPST end users comply with style standards outlined in style manuals of the ACS, APA, MLA, and IPST. The team leader assisted with source referencing on occasion, but generally referred users to editorial services staff.

In summation, users were comfortable with their favorite industry resources on the Web in multimedia formats. They were enthusiastic about becoming avid and informed information gatherers, particularly through the use of database searching and by establishing fluency with GALILEO and GTEL. However, they



needed improvement in formulating search strategies using Boolean logic and applying customized database searching techniques. Attendees were not familiar with natural language programming search techniques, which have become quite popular with some information service vendors. A small percentage of users could suggest databases they had used for topical searches through recommendations made by the information consultants. All participants could articulate their technical subjects and topics of interest. The level of user awareness of resources at their fingertips via the library intranet was impressive—users appeared to be savvy regarding the library's intranet.

Where do we go from here? Libraries will be required to review, in an ongoing fashion, all aspects of their information literacy programs to ensure that they meet the needs of users. As user needs change, product content will also, along with product packaging and access platforms. Products exist to meet user needs across a myriad of subject disciplines and technical capabilities.

## Conclusion

While many of the model outreach programs described here are meeting the current needs of users, it is imperative that information professionals continue to enhance the critical skills they need to support all aspects of library-related services and continue to review the information needs of users. To meet user needs in a virtual environment, the information professional must update his or her knowledge and skills in specific areas, such as knowledge management, electronic resource sharing, metadata, and Web page design and management. Furthermore, since many information seekers rely on resources found on the Web and in an array of multimedia formats, information professionals will need to have enhanced Web power searching capabilities and expertise across a broad spectrum of industry databases. End users require integrated access portals across a broad spectrum of subject disciplines; continuous exploration of resource content, repackaging, and pricing models is necessary to formulate optimum content platforms. Management requires skills in competitive and business intelligence, current awareness sourcing, and reviewing, critiquing, and customizing quality websites. Information professionals must be prepared to meet the future challenges of the information industry in the new virtual environment.

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# information trends

## The 10 R's Facing Information Professionals in Our Association

By Stephen Abram

Scratch a librarian and you'll get a story—what a wonderful profession we share! It's great to return from another annual conference, having networked with and learned from so many brilliant colleagues. What was the hot topic at our annual conference this year? Why, us, of course—we're all struggling to define a great future for ourselves. I always come back from our conference with more questions than answers, and I think that's the best result, since improving the question, not just getting the info, is our stock in trade. What were we asking questions about this year? Here's what I heard . . .

### 1. Relevance

This had to be the biggest focus. We were considering how to ensure not only that we are relevant in this world but that our relevance is recognized. From discussions on branding, marketing, and public relations, I heard about the challenges of our relationships with executives, professors, users, and other professionals as we deal with the changes in our positioning in the marketplace. How do we powerfully respond to the perception that "Everything is free on the Internet"? How do we powerfully and effectively describe our contributions and roles in our organizations? What can our association do to support us?

### 2. Re-skilling

Many of our colleagues think that we need to acquire or improve a few specific skills in order to succeed over the long term. Surprisingly, technology skills were not at the top of the list. I heard that we need specific training in influencing skills, marketing and selling skills (for ideas and programs), financial skills, and strategic planning skills. The pendulum is definitely swinging back to a balance between technical skills and management skills.

### 3. Renewed competencies

I heard lots of talk of the reinvigorated Competencies for Information Professionals of the 21st Century from our association task force. Folks were looking at the package that focused on our strong expertise in (1) managing information organizations, (2) managing information resources, (3) managing information services, and (4) applying information tools and technologies, along with the exciting review of our personal aptitudes.

People were especially excited about the proposal to create a competency development toolkit to help members move forward.

### 4. Recruitment and retirement

We discussed at length—in hallways, lobbies, and meeting rooms—who we want to be part of our association. I found a renewed openness to learn from others with whom we share the information world—an increased "permeability" toward learning from other professionals and opening our association to a wider membership, both geographically and among those practicing in specialized ways who identify with our values. Many discussions involved turning the approaching "retirement bulge" that threatens our association's health into a plus with a broader and more dynamic approach to networks, professional development, and learning from all.

### 5. Rhythm

This is my word for the "hum" of the conference. Members seemed ready for change. They seemed to want a new 21st century rhythm. It was a positive buzz, it was orchestral, and it was music to my ears. I attend our annual meeting every year to retreat and reinvigorate my commitment to our profession. I was happy to see such a positive outlook. Sure, there are some challenges, but the attitude was that we could deal with them because we are committed professionals.

### 6. Reinvention

People understand that the reinvention of our profession does not mean throwing off the traditions and successes of our long and valuable history. As in the patent process, reinvention builds on itself: Everything is an extension of its past, but every change discovers a new mode and a new way of being successful. I hope we have the support of our professional colleagues as we experiment. Those who try new things are the leaders—they find the future for all of us. There is excitement for all of us in the journey of discovery.

### 7. Range

We clearly want more of it. Members talked about the pleasure they experienced working on companywide teams or task forces. Some expressed their frustration at the "glass box" that prevents them from having these experiences. It was painful to hear about those who had a vision for making a really big difference in their organization's strategies and vision but who were not included. We need to share more stories about members who have been successful in developing alliances, internal networks, and management communications that



allow them to succeed in having a greater impact. I hope some of the great stories I heard in New York are shared through discussion lists and in articles in division and chapter newsletters.

### 8. Reserve

Less of it! That's what I heard clearly. We have to be less reserved. We have to speak up for ourselves. We have to tell more positive stories. We have to take our light out from under the basket and burn down the town! Well, not quite—but we do need to capture the attention of our managers, leaders, and organizations and help them understand the strong contribution we make to our enterprises and to society. And we need to do that NOW. No more false modesty—just professional confidence in our talents and competencies.

### 9. Radioactivity

We need to act as a professional group in which every member is part of an army that gets out the message. Our association needs to provide us with the tools, opportunities, and training. Then we must become “viral”. We need to spread our message quickly and we need to be radioactive—shining our message right through our organization's DNA to permeate everyone who counts. When all of us work together, the power will be exponential. I saw people coming to terms with this insight. We're ready.

### 10. Renewed energy

At this year's annual conference, we exemplified the aptitudes and attitudes promoted by the Competency Task

Force for every information professional:

- Seeks out challenges and capitalizes on new opportunities
- Sees the big picture
- Communicates effectively
- Presents ideas clearly; negotiates confidently and persuasively
- Creates partnerships and alliances
- Builds an environment of mutual respect and trust; respects and values diversity
- Employs a team approach; recognizes the balance of collaborating, leading, and following
- Takes calculated risks; shows courage and tenacity when faced with opposition
- Plans, prioritizes, and focuses on what is critical
- Demonstrates personal career planning
- Thinks creatively and innovatively; seeks new or “reinventing” opportunities
- Recognizes the value of professional networking and personal career planning
- Balances work, family, and community obligations
- Remains flexible and positive in a time of continuing change
- Celebrates achievements of self and others

Cool! I celebrate my fellow members I think it was Groucho Marx who said he wouldn't belong to any organization that would have him as a member. I certainly would never say that about our association.

This column contains the personal opinions of Stephen Abram and does not necessarily represent the opinions or positions of Micromedia ProQuest or SLA. Stephen would love to hear from you at [sabram@micromedia.ca](mailto:sabram@micromedia.ca).







## 2003 New York Conference Wrap Up



By **Anthony Blue**

*Anthony Blue is SLA's director of public relations. He can be reached at [anthony@sla.org](mailto:anthony@sla.org).*



## ... SLA's 94th Annual Conference

**NEW YORK CITY WAS THE BACKDROP JUNE 6–12 FOR SLA'S 94TH ANNUAL CONFERENCE— 6,798 INFORMATION PROFESSIONALS PARTICIPATED IN A WEEK OF ACTIVITIES AND EVENTS. ON DAY ONE OF THE CONFERENCE, THE BOARD OF DIRECTORS ANNOUNCED THE APPOINTMENT OF JANICE R. LACHANCE AS THE NEW EXECUTIVE DIRECTOR; THE LAST DAY CONCLUDED WITH A HISTORIC VOTE ON THE ASSOCIATION'S NAME. THE FOLLOWING ARE SOME OF THE HIGHLIGHTS OF THE CONFERENCE.**

### Executive Director Appointment

On Friday, June 6, SLA president Bill Fisher announced that the board of directors had appointed Janice R. Lachance as executive director of the Special Libraries Association. For the past two years, Lachance has been consulting with non-profit and membership organizations in the areas of strategic planning, organizational development/transformation, and culture change. From 1993 until January 2001, she held a variety of positions in the U.S. Office of Personnel Management (OPM), the federal government's human resources agency, starting as director of communications and policy and serving as the agency's director from 1997 until 2001.

During the announcement, Fisher remarked, "Janice brings a wealth of diverse experience to SLA. She is very passionate about the future of information professionals and the rapidly changing environment of the special library profession. Her dedication and overall enthusiasm will be an asset to the Special Libraries Association on all levels. I speak for the board of directors and staff when I say that we look forward to fostering a positive relationship with her."

### 2002/03 Board of Directors Meeting

Several key issues were addressed at the Executive and Open sessions of the Annual Board Meeting June 6–7. Langan & Associates presented a report on the 2003 election. Members were appointed to the 2005 Annual Conference Program Committee. The Nominating Committee presented the slate of candidates for 2004 elections. The candidates are president-elect: Daille Pettit and Pamela Rollo; division cabinet chair-elect: Katherine Bertolucci and Trudy Katz; chapter cabinet chair-elect: Elizabeth Bibby and Patricia Cia; directors: Susan Klopper, Dee Magnoni, Lyle Minter, and Dan Trefethen. The 2003 Research Grant was awarded to Linda C. Smith and Lian Ruan. Members were appointed to the 2005 Nominating Committee. The Pre-Conference Highlights and 2004 Association Program Plan were presented, as were the Treasurer's

Remarks and the Report of the Spring Finance Committee Meeting. The sale of the Special Libraries Association headquarters building in Washington, DC [?] was approved. Sites were chose for the 2007 and 2008 conferences. The 2004 Nashville Conference Program Committee made a report. The Competencies for Information Professionals of the 21st Century were approved, and many committee charge revisions were presented to the board for approval.

### Leadership Development Institute

The Leadership Development Institute, sponsored by Reuters, deviated from the norm this year to focus on preparing leaders for a time of change. SLA's chapter, division, and caucus leaders were introduced to the association's top leaders, candidates for the board of directors, and executive director-designate Janice Lachance. Among the topics were a revised mission and vision for the association, the proposed new governing documents for chapters and divisions, and 2003–04 president Cynthia Hill's vision for SLA, its chapters, divisions, and caucuses. Each leader was given the opportunity to personalize the institute learning experience by participating in one or more roundtable discussions on 33 leadership topics.

### SLA Awards Reception

On Sunday evening, SLA hosted the Awards Reception in the historic University Club at 54th Street and 5th Avenue in Midtown Manhattan. Andrew Berner, University Club librarian and a 2003 SLA Fellow, opened the ceremony with a brief and informative historic overview of the building and the club. SLA president Bill Fisher hosted the ceremony, which recognized and acknowledged the accomplishments and achievements of 18 award winners. SLA sponsors and major conference partners were also acknowledged for their continued support of various SLA activities and events. The list of award winners and sponsors recognized at the Awards Reception includes:



**SLA Hall of Fame****H. Robert Malinowsky****John Cotton Dana Award****Stephen K. Abram****Rose L. Vormelker Award****Robert V. Williams****Fellow of the Special Libraries****G. Lynn Berard****Andrew Berner****Sylvia R. M. James****Trudy Katz****Mary "Dottie" Moon****Factiva Leadership Award****Robert Bellanti****Innovations in Technology Award****Nina L. Platt****H. W. Wilson Company Award****Sara R. Tompson****Lorri A. Zipperer****Member Achievement Award****John J. DiGilio****Diversity Leadership Development Award****Christina Birdie****Persko L. Grier****Toby A. Lyles****Lian Ruan****Pradnya Yogesh****SLA President's Circle****H. W. Wilson Company****Standard & Poor's****LexisNexis****Factiva****Dialog****Major Conference Partners****Factiva****Dialog****Chemical Abstracts Service**



## CAS INFO-EXPO Ribbon-Cutting Ceremony and SLA Laptop Giveaway

On Monday, June 9, SLA president Bill Fisher, acting executive director Lynn K. Smith, and Suzan Brown of Chemical Abstracts Service officially opened the 2003 SLA INFO-EXPO (exhibit hall) in the New York Hilton Hotel and Towers. Located on three levels of the hotel, the INFO-EXPO boasted more than 300 exhibits, showcasing the latest electronic and online resources in the information industry. Devonne Henry, SLA director of exhibits, presided over the giveaway of a 14-inch COMPAQ laptop computer.

## Opening General Session

On Monday, June 9, Pulitzer prize winner and best-selling author David McCullough delivered an outstanding keynote presentation to a standing room only crowd of 3,500 conference participants in the Grand Ball Room of the New York Hilton Hotel and Towers. McCullough, entertaining and charismatic, spoke on many topics during the session, including his early years as a writer; appearing on "Smithsonian World" and "The American Experience," and narrating numerous documentaries, as well as learning how to use a library while working in New York and Washington. He also discussed the disadvantages of becoming too technologically savvy.

After his keynote presentation, McCullough signed copies of his latest book, John Adams, at the SLA Market Place.

## Tuesday's General Session

Futurist Stewart Brand delivered a presentation to conference participants on Tuesday, June 10, in the New York Hilton Hotel and Towers. Brand's PowerPoint presentation focused on the growth and importance of technology and how to ensure that that the future doesn't slip away through misadventure, miscal-

culation, or just plain neglect. Brand spoke about his involvement with building a 10,000-year clock and tools and services toward a 10,000-year library. Brand discussed his work with the All Species Inventory, which involves finding and documenting all life on Earth in 25 years, and he enlightened the audience on "How Buildings Learn" as they evolve over the years.

## Networking Reception

On Tuesday evening, a networking reception was held on all three levels of the INFO-EXPO exhibit hall, sponsored by SLA and the Thomson Companies. Large crowds of conference goers were treated to hors d'oeuvres, dessert, and wine while they networked with vendors.

## Madeleine Albright Reception

On Wednesday, June 11, in the Morgan Suite of the New York Hilton Hotel and Towers, former secretary of state Madeleine Albright participated in a meet-and-greet for SLA leaders, sponsors, award winners, exhibitors, vendors, and press before her keynote presentation at the Closing General Session. Albright discussed a variety of topics and answered questions from invited guests.

## Closing General Session/Annual Business Meeting

After the meet-and-greet, Albright spoke to a standing room only crowd of 4,000 conference participants. She talked about her service as the first woman secretary of state and described the expansion and modernization of NATO and NATO's successful campaign to reverse ethnic cleansing in Kosovo, and her trips abroad, including her role in the promotion of peace in the Middle East and the reduction of nuclear dangers from Russia. Albright discussed the current threat from North Korea and the Bush administration's policy for dealing with North Korean dictator Kim Jong Il.

## SLA Chapter, Division and Caucus Reports

The following Chapter, Division and Caucus Reports have been submitted to Information Outlook and are available on the Web: [www.sla.org/informationoutlook](http://www.sla.org/informationoutlook)

### Chapters

#### Indiana (CIN)

*By Randall Halverson*

#### Rhode Island (CRI)

*By Paige Gibbs*

### Divisions

#### Advertising & Marketing (DAM)

*By Betsy Hoza*

#### Biomedical & Life Sciences (DBIO)

*By David Duggar*

#### Chemistry (DCHE)

*By Submitted by Suzanne Fedunok*

#### Education (DEDU)

*By Deborah Garson*

#### Engineering (DENG)/Aerospace (SENA)

*By Mary L. Crompton*

#### Food, Agriculture & Nutrition (DFAN)

*By Pat Allen*

#### Information Technology (DITE)

*By Georgia M. Higley*

#### Legal (DLEG)

*By Lori Hedstrom*

#### Materials Research & Manufacturing (DMRM)

*By Ed Malloy*

#### Military Librarians (DMIL)

*Sharon Lenius*

#### Museums, Arts & Humanities (DMAH)

*By Ann Shea*

#### Pharmaceutical & Health Technology (DPHM)

*By Stephanie Fitch*

#### Physics-Astronomy-Mathematics (DPAM)

*By Michael Fosmire*

#### Science-Technology (DST)

*By Mitchell Brown*

#### Social Science (DSOC)

*By Heidi Yacker*

### Caucus

#### Baseball (KBSB)

*By Tony Landolt*

#### International Information Exchange (KIIE)

*By Marcelle Saint-Arnaud*

#### Retired Members (KRET)

*By Frank H. Spaulding*





### Annual Business Meeting

The annual business meeting was held immediately after the Closing General Session. SLA president Bill Fisher presided over his final board of directors meeting. The agenda items included introduction of the 2002/2003 board of directors; President's Report; Treasurer's Report (given by Richard Geiger); and Executive Director's Report (presented by Lynn K. Smith). Fisher introduced the 2003/2004 board of directors. Incoming SLA president Cynthia Hill gave her inaugural address and introduced the Nashville conference logo and video.

### SLA Branding Vote

President Bill Fisher moderated the branding name vote at the annual business meeting. The vote was a multistep process, starting at the beginning of the week when SLA members picked up voter cards at the conference registration booth. Only members who attended the annual business meeting were allowed to vote. By a margin of 654 to 343, SLA members preferred "Information Professionals International" as a potential new name over "SLA" (the acronym) (87 in favor and 867 against). A motion was then made to amend the bylaws to change the name from Special Libraries Association to Information Professionals International. For a name change to pass, the vote had to be won by a two-thirds majority. Before the final vote, members debated the pros and cons of changing the name of the association. The final vote was 521 in favor of Information Professionals International and 369 against, far short of a two-thirds majority. The vote culminated three years of research, discussions, and brand name debates.

### SLA Branding Press Briefing

Immediately following the branding vote, SLA president Cynthia Hill held a press briefing to announce that the association would retain its nearly 100-year-old name. Hill said, "The name Special Libraries Association is a highly recognized and respected brand name in the information industry. It stands for professional excellence, ethics, and best practices in the management of knowledge-based organizations. Our members have always been on the cutting edge, applying information tools and technologies to advance the missions of our organizations. Keeping our name allows us to build on our heritage over the past century while keeping our focus on the expanding information economy of the 21st."

### SLA Branding Initiative

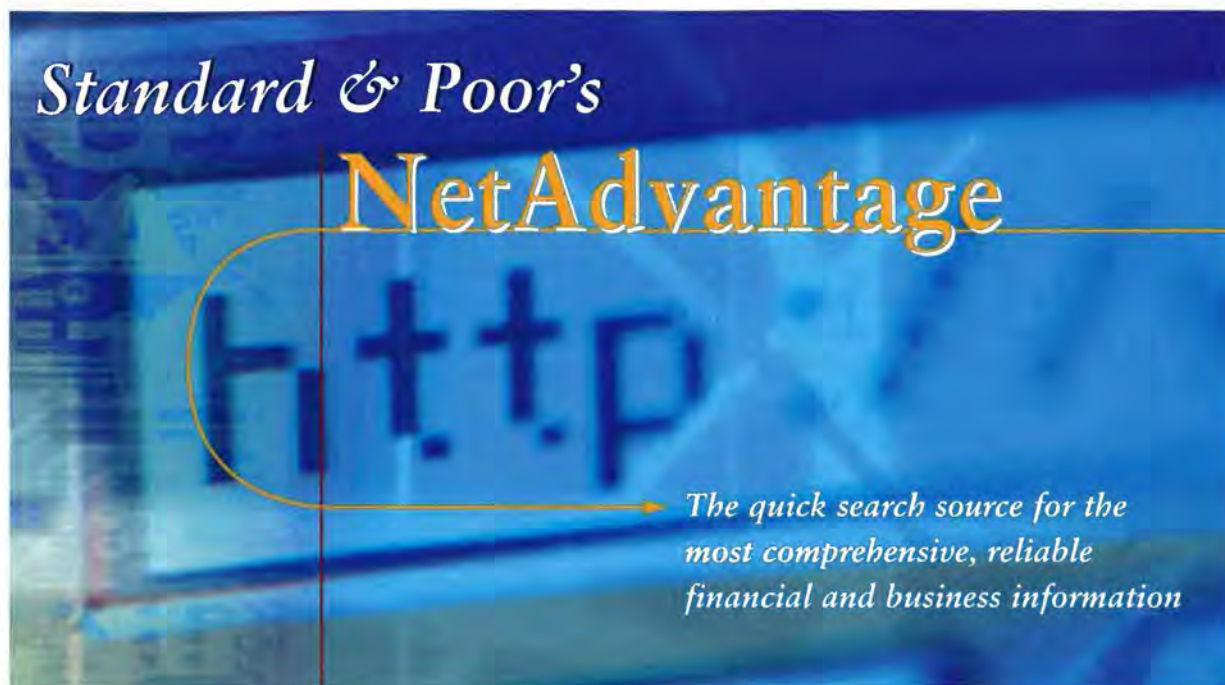
The SLA board of directors announced that Chris Olson & Associates has been selected to lead the initiative, to brand the association across the industry and accentuate the value that SLA members contribute to today's information economy.

### 2003/04 Board of Directors Meeting

On Thursday, June 12, SLA president Cynthia Hill held the first meeting of the 2003/04 board of directors. The agenda included election of the board secretary, president's expectations for the coming year, conference wrap-up, division and chapter governing documents, Leadership Code of Responsibility, and the charge to the Student Academic and Relations Committee. The board will hold its fall meeting October 23–25, 2003, at SLA Headquarters in Washington, DC. For more information on the board of directors, visit Virtual SLA at [www.sla.org](http://www.sla.org).



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# copyright corner

## Deep Linking:

### The Plot Thickens

By Laura Gasaway

To date, there have been only a handful of cases involving copyright and the practice of "deep linking" on the Web—that is, linking to an interior Web page on another website rather than to the front page.

One case that has been closely watched is *Ticketmaster v. Tickets.com*. In March 2003, the federal district court for the Central District of California granted a motion for summary judgment on the copyright issues in the case. The case is especially instructive for those in the for-profit sector, although litigation on this issue is likely in other sectors as well. Ticketmaster and Tickets.com are competitors in the business of selling tickets to concerts, sports events, and other performances. Ticketmaster, the larger company, sells tickets by four methods: from the venue box office, through retail outlets, over the telephone, and via the Internet. Tickets.com sells tickets primarily over the Internet. Both companies have websites that describe each event and provide information such as location, date, time, and ticket price. Each event described by Ticketmaster has its own page, with a separate URL. Thus, anyone who has the URL can bypass the Ticketmaster front page and go directly to the page describing the event. This interior page has a telephone number a person can call to order tickets for the event.

Tickets.com used a spider to review Ticketmaster's internal Web pages, and—for more than two years—it extracted information from the Ticketmaster Web pages and posted it on its own website. (A spider or crawler is an electronic program that automatically

searches through Web pages, extracts information, and places it on another website.) The information that the Tickets.com spider extracted consisted of event, date, time, ticket prices, and URL. In addition, Tickets.com included a deep linking option to go directly from its website to the relevant Ticketmaster interior Web page. This practice ceased in early 2000, when Ticketmaster sued for copyright infringement and breach of contract.<sup>1</sup>

The court noted that three separate copyright issues were involved: (1) whether the capturing of Ticketmaster's electronic signals via the spider, their momentary residing on Tickets.com's computers, and their use to form Web pages is actionable; (2) whether

**Ticketmaster and Tickets.com  
are competitors in the  
business of selling tickets  
to concerts, sports events,  
and other performances.**

URLs copied from Ticketmaster represent copyrighted material; and (3) whether the deep linking caused an unauthorized display of Ticketmaster's Web pages. The court held on the first issue that using a spider to capture and temporarily download unprotected, publicly available factual information concerning ticketed events was fair use. On the issue of whether the copied URLs constituted copy-

righted materials, the court held that URLs are simply Web addresses—they are facts and, thus, are not subject to copyright protection.

The deep linking issue is of particular concern. The court discussed the 9th Circuit decision in *Kelly v. Arriba Soft*<sup>2</sup>, a visual search engine case that found that in-line linking (i.e., framing) to photographs on the plaintiff's publicly available website was infringement. Here, Ticketmaster alleges that when a user of the Tickets.com website clicked on the links to Ticketmaster's website, a smaller window was opened that was "framed" by the larger window. The defendant maintained that whether framing occurred depended on how the settings on the user's computer were configured and, thus, was beyond its control. So, framing sometimes occurred, but not always.



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Moreover, the defendant was careful to identify Ticketmaster's Web pages as belonging to Ticketmaster.

The court held that if the Ticketmaster pages were framed within Tickets.com's pages, the case was indistinguishable from *Kelly*. However, in this case a user of the Tickets.com website was taken directly to a particular event page on the Ticketmaster site. Further, each Ticketmaster page was clearly identified as belonging to it. In fact, the link on Tickets.com contained this notice: "Buy this ticket from another online ticketing company. Click here to buy tickets. These tickets are sold by another ticketing company. Although we can't sell them to you, the link above will take you directly to the other company's website, where you can purchase them." The court granted a summary judgment to Tickets.com on the deep linking copyright claim, holding that even if the Ticketmaster site was displayed as a smaller window and was thus framed on the Tickets.com website, it was not clear that as a matter of law such linking constituted a public display of Ticketmaster Web pages and, thus, copy-

right infringement.

A contract issue remains to be litigated because of a notice that Ticketmaster had placed on its homepage stating that anyone who went beyond that point into an interior page of the website could do so only under certain conditions, among them that the website was for personal use only and that the information it contained could not be used for commercial purposes. The court said it would have preferred that the Ticketmaster website require the user to specifically assent to the conditions—for example, by clicking on an "I agree" button—rather than just posting the notice on its front page. Because Ticketmaster had notified Tickets.com by a letter of these conditions (and despite the fact that Tickets.com had replied by mail that it did not accept the conditions), the court refused to grant a summary judgment on the contract issue. Thus, the contract issue will be litigated. It is also possible that the summary judgment on the copyright claims could be appealed.

1 There was also a claim for trespass to chattel, on which the court granted a summary judgment to Tickets.com, but that claim is not relevant to this discussion.

2 280 F3d 934 (9th Cir. 2002).



# Business Intelligence and Knowledge Management



By Anne Walker and Kathleen Millington

Anne Walker is the Information Scientist in the Library and Information Center (LInC) at Berlex Laboratories in Montville, NJ. She can be contacted at [anne\\_walker@berlex.com](mailto:anne_walker@berlex.com). Kathleen Millington is manager of the Library and Information Center at Berlex Laboratories in Montville, New Jersey. She can be contacted at [kathleen\\_millington@berlex.com](mailto:kathleen_millington@berlex.com).



## ... Tools to Personalize Knowledge Delivery

**Berlex Laboratories, an ethical pharmaceutical company headquartered in Montville, New Jersey, produces, develops, and markets specialized medicines, including radiopharmaceuticals, for diagnostic imaging, oncology, female health, cardiovascular disease, dermatology, and central nervous system disorders. Berlex is the U.S. affiliate of Schering AG, Germany, a global company based in Berlin whose history reaches back more than 130 years.**

Berlex's Library and Information Center (LInC) supports the information management needs of the business and therapeutic units in Montville and Wayne, NJ. With a staff of two information managers and two paraprofessionals, the LInC supports all reference and literature searches as well as Food and Drug Administration (FDA) and regulatory activities. The LInC also processes invoices, supports global licensing for U.S. materials, and produces two daily informational newsletters on pharmaceutical industry activities.

### Business Intelligence and Knowledge Management

Knowledge management has been defined as "the methods and tools for capturing, storing, organizing, and making accessible knowledge and expertise within and across communities." And one of those tools is business intelligence. Knowing everything you can about your competition—from past achievements to future actions—helps your company compete successfully. The inclusion of business intelligence as part of knowledge management is commonplace in the day-to-day efforts of the corporate knowledge worker.

Capturing knowledge and information within the pharmaceutical industry is a significant operation for us in the LInC. Berlex Laboratories focuses on many different areas of medicine. As Berlex expanded, the LInC was finding it increasingly difficult to keep track of the many varied sources of information. Pieces of information from different sources were being tracked and stored in various places. It became apparent that we needed one integrated repository for our diverse forms of information. In the past, Berlex had initiated the InMagic® suite of database tools to organize library processes. With the company's information technology department stretched to capacity, we found that InMagic provided the functionality we desired, coupled with a user-friendly platform that allowed us to perform many of our own IT-related procedures.

With visions of an integrated knowledge management system in our future, we purchased InMagic's IntelliMagic™, tool to help our department index, organize, and store the various types of pharmaceutical business information we use.

The first step in developing such a tool is determining the focus of the effort. What areas in the vast pool of information are we going to cover? The answer depends on the resources available. Given our small staff, we decided to focus on generally available business information, both free and subscription-based, and to use IntelliMagic as a simple information repository. While we recognize that data-mining is a key component of business intelligence, we decided to forgo that aspect of our tool for the moment because of limited resources.

Our database is structured to pull information from licensed and public databases as an on-demand service, so the resulting information is as current as the database at that point in time. For now, our system does not act as a data warehouse, storing archival information. We felt that our limited time would be best spent developing a product that would deliver a consolidated current snapshot.

Through the LInC, Berlex subscribes to several proprietary products and services, some of which require separate training and searching to obtain overlapping information. The benefit of IntelliMagic is that it provides a preformatted repository for different information formats. The product uses a canned search creator that takes the format of a query created by a specific database product and stores it, thus enabling a user to query that database with a simple keyword or two. Using this canned query creator, we can now integrate several types of information into one company profile. For example, we can create a complete company profile by combining information from the NDA (New Drug Application)



Pipeline, a product of FDC Reports and the U.S. patent and Trademark Office (USPTO.gov); review articles and trial information from PubMed; news and stock information from NewsEdge; federal filings from the Securities and Exchange Commission (SEC.gov); and links to the company website and product websites themselves. Our offering, called the Business Intelligence Database, resides on our intranet and is open to all users who have the correct permissions. Naturally, the database is restricted to users who are covered under the licensing of the electronic resources used.

Each company profile in the Business Intelligence Database contains the same types of information, where appropriate. The most important aspect of this database is the preformed canned query. With this ability, we can set up the syntax for each query without having to worry about the content for each record. The content is updated as the site changes. This allows us to set up a large database with hundreds of records, without a great deal of hands-on updating. Not only is it easy for the LInC staff to set up and maintain, but our users know they are getting the most current information supplied by the products.

Additional fields in each record type may contain internal documents, such as meeting notes or project timelines. Combining these internal documents with the relevant external information creates a true knowledge management system.

#### Marketing and Knowledge Management

Several years ago, we created another offering using the InMagic suite of database tools. The Market Intelligence Repository (MIR) serves as a storage and retrieval system for full-text and bibliographic data of company-produced documents. InMagic indexes many different file types, such as Microsoft Office files and PDFs, to provide for an integrated system accessible to all users. The content of this product is handled almost exclusively outside the LInC domain. Using InMagic's webforms, the marketing areas of each therapeutic department are responsible for entering their own information into the system, thus providing a common resource for users in different departments to share their information. Any person with rights to the system can search and find internal memos, meeting minutes, or reports.

#### Other Resources

Our corporate intranet has additional potential for

integrating knowledge management into the lives of our users. The intranet is currently being converted to a software authoring and publishing program called Aptrix which uses Verity as a search engine. Once this transition has been completed, we plan to launch a service wherein we manage a limited number of user-preferred sites and passwords. The privacy functions in Aptrix will allow a user who has access to our site/password tool to view his or her site, while preventing an unauthorized user from having access to the tools page. Unauthorized users will get a message that describes the tool and directs them to the LInC for more information.

#### In the Future

Future knowledge management initiatives depend on our customer base. We have developed a useful tool that contains current business information pulled from a variety of sources into an aggregate information portal. However, in order to make this tool more useful to the Berlex community at large, we must know who is using it and how. Once we determine current usage, we can see where the information gaps are and what the potential is for personalization.

We are working with InMagic to migrate our InMagic-based Web services from HTML to XML. With the added functionality of this language, we hope to provide our users with more flexible information delivery. We also hope to develop a thesaurus that will allow our users to develop a strategy of integration that fits their needs.

Our goal is to personalize our knowledge delivery even more, finding new and better ways to present our carefully researched and stored information to our growing user base.

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# 2003: A Year of Milestones for ACS Publications



- 1** Year Anniversary of the ACS **Journal Archives** and *Journal of Proteome Research*
- 2** Consecutive years ACS Publications recognized as the “Most Requested” journals in CAS Science Spotlight<sup>SM</sup>
- 3.715** Impact Factor for *Organic Letters* as per the 2002 ISI<sup>®</sup> JCR—leading all journals in organic chemistry publishing more than 100 articles
- 5** Year Anniversaries of the *Journal of Combinatorial Chemistry* and *Organic Letters*
- 5.033** Impact Factor of *Nano Letters* in 2002—in the top ten of Chemistry, Multidisciplinary
- 5.193** Impact Factor of *Journal of Combinatorial Chemistry* in 2002—in the top ten of Chemistry, Multidisciplinary
- 6** Number of **new journals** introduced by ACS since 1999
- 7** Days per week ACS Publications are available online
- 24** Hours per day ACS Publications are available online
- 33** Number of ACS Publications available in print and online
- 75** Years of publication of *Analytical Chemistry*
- 80** Year Anniversary of *Chemical & Engineering News*
- 100** Total issues published by *Organic Letters* on May 1, 2003 with publication of Volume 5, Issue 9
- 125** Year Anniversary of the *Journal of the American Chemical Society*, the #1 “Most Requested” journal in CAS Science Spotlight<sup>SM</sup>

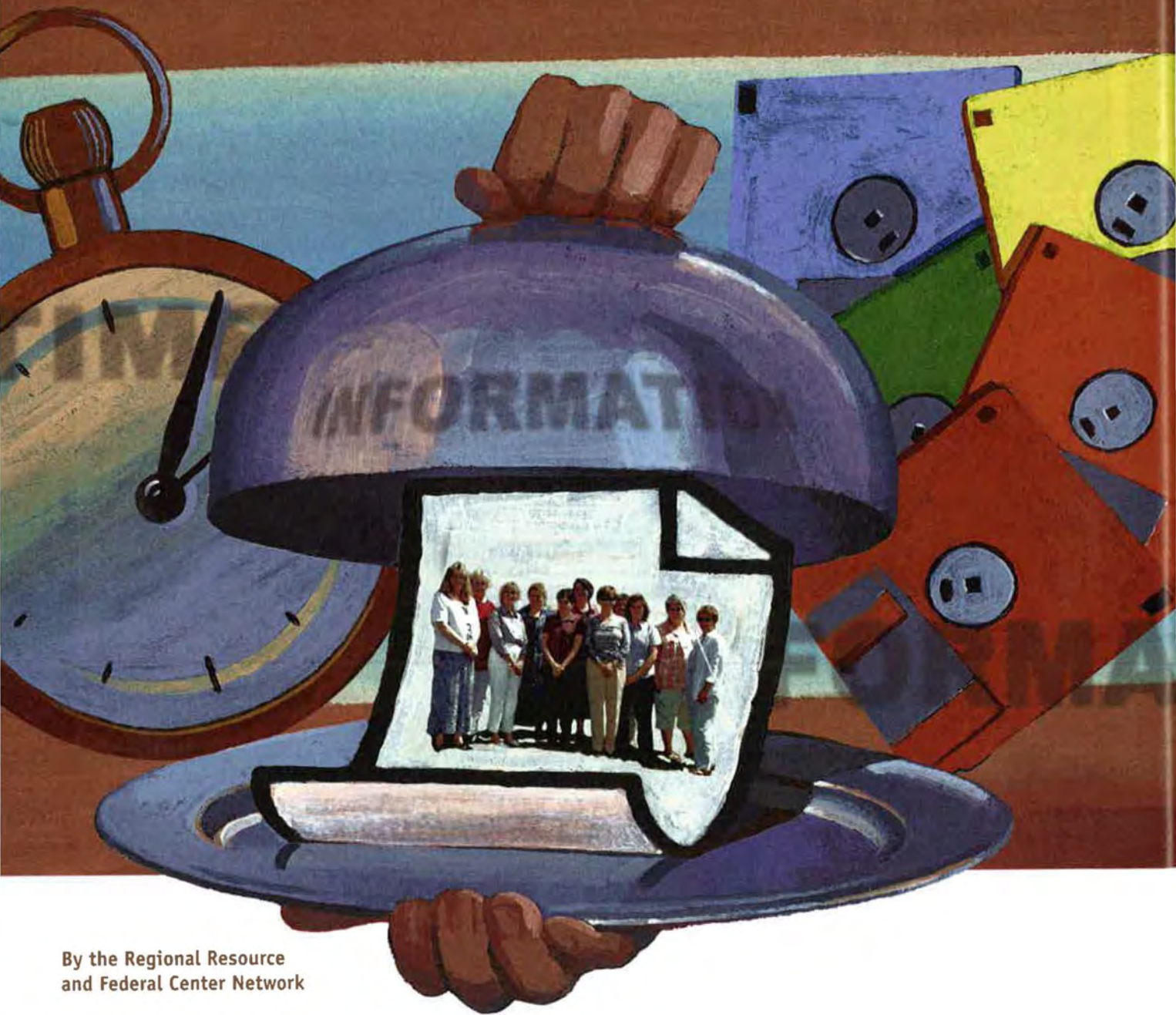
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# At Your Service-- "Too Much Information"? Not for the RRFC Network



By the Regional Resource  
and Federal Center Network

Contact: Cybele Elaine Werts of the Northeast Regional Resource Center, 20 Winter Sport Lane  
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## ...The Personal Touch Makes the Difference

*A state director of special education is planning a summit on autism and related issues, and wants to incorporate the latest research findings, as well as information from other states that have autism initiatives.*

*Parents of a child with a severe behavior disorder are looking for a specialized school in their area.*

*A state education agency has questions about how to make improvements in its monitoring process.*

*A local education agency is planning to produce a policy manual for its school districts. It is looking for guidance documents on using foreign language translators in a special education setting.*

The questions range from afterschool programs to transportation, but the answers all come from one comprehensive source: the information specialists of the Regional Resource and Federal Center Network, who find, organize, and disseminate information on issues related to special education. Whether they are performing a customized search or polling their peers, the information specialists draw on a national network of technological and personal connections. It is the personal touch that makes their services more than just another information resource. With the amount of information related to special education mushrooming to nearly immeasurable proportions, they provide the right information from the right source at the right time in the right format.

### Impact on Schools

Shauna Crane of the Mountain Plains Regional Resource Center (RRC) in Logan, Utah, gives an example. "In November 2002, I received a request from a local district in Arizona. They had a remodeling project going on in their school, and the classroom sizes were being changed to smaller ones for students with disabilities. The Local Education Agency (LEA) representative asked me for information on how to make the accommodations equitable. I researched the question and provided the legal citations on accessibility. The LEA in turn shared this information with the administration, resulting in a change in the remodeling plans. The classrooms are now being built in the appropriate size."

Such information retrieval and dissemination are among the numerous technical assistance strategies employed by the RRCs. Information specialists in each center use an array of methods to help states get the information they need to serve students with disabilities. These methods

may include responding to individual information requests, creating Web-based information modules, creating and disseminating documents, and providing direct technical assistance to states, which helps increase their own information capacity. Information specialists also provide assistance to local school districts and to children and youth with disabilities and their families.

### What the Network Does

The primary goal of the RRC Information Network is to increase the depth and utility of high-quality information provided to administrators, policymakers, educators, and parents. These core services are provided free to states, with federal funding through the Individuals with Disabilities Education Act (IDEA). The mission statement of the Office of Special Education Programs (OSEP) of the U.S. Department of Education states, in part, "IDEA authorizes formula grants to states and discretionary grants to institutions of higher education and other nonprofit organizations to support research, demonstrations, technical assistance and dissemination, technology and personnel development and parent-training and information centers. These programs are intended to ensure that the rights of infants, toddlers, children, and youth with disabilities and their parents are protected." <http://www.ed.gov/offices/OSERS/OSEP/About/aboutusmission.html>

Because they are individually funded and managed, the RRCs are autonomous, but they work closely together to meet the needs of their client states. By networking and pooling resources, the centers provide the most impact for the least cost. The Federal Resource Center website (<http://www.dssc.org/frc>) offers a directory of all the RRCs and other technical assistance projects funded by the Office of Special Education and Rehabilitative Services (OSERS).



## Tools and Strategies

Each RRC is staffed by one or more information specialists who maintain information-rich websites and respond to information requests from states. The RRCs are also building libraries of materials, including books, periodicals, manuals, and electronic media, to support this work. "The topics covered by information requests are so varied," says Emily Thompson of the Southeast RRC in Montgomery, Alabama, "that we need to have access to a wide variety of electronic and paper materials, as well as contacts with state and national specialists." To manage this large amount of information, the information specialists have developed a number of tools and strategies for gathering and organizing information that make for a cost-effective and streamlined system.

### 1. The System for Technical Assistance Resources (STAR)

database contains all completed information requests and is searchable by keywords and descriptors, as well as by date. If, for example, a state needs information about what other states are doing to include students with disabilities in large-scale assessments, the information specialist can check the database to determine if a similar request has been fulfilled in another region.

Recently, a teacher in North Carolina requested research on separate classroom settings for general education and special education students; specifically, data that show that separate classrooms are not always the best place for a child with a disability. Judy Johns, information specialist at Mid-South RRC in Lexington, Kentucky, searched the STAR database to see how this issue had been researched in the past, then presented the information to those involved in the placement decision-making process for a particular child. Because the decisionmakers had this information at the right time, the child remained in general education and was not placed in a separate classroom.

2. A standardized thesaurus of special education descriptors has been organized into a database with an Internet-based interface. Descriptors listed in the thesaurus can be used to search library collections housed in any of the RRCs and to help define the search when one RRC requests

assistance from the rest of the network. The thesaurus was developed using standardized language common to special education and is updated regularly with new terminology. "Our thesaurus workgroup continuously reviews new terms," says Cathleen Palmer of the Northeast RRC in Williston, Vermont. "Out of that work, we decide whether or not to include each new word, as well

as what usage of the term will be recommended." The thesaurus uses standard structure (broader, narrower, related to, use for, and use) to enable even the least experienced user to obtain the most accurate terms for searching.

3. A standardized protocol for information requests guides specialists in asking the right questions and managing multiple requests. The protocol has two purposes: to help shape the reference interview and to help shape the request before sending it to the net-

work. "Sometimes people ask questions that aren't very specific," says Cybèle Elaine Werts from Northeast RRC. "We learn how to ask questions about the request so we can focus it into an organized response." Daphne Worsham, of the Western RRC in Eugene, Oregon, adds, "This reference interview—often several fairly lengthy conversations—frequently reveals the need to research topical areas or resources that the requestor wasn't originally aware were connected."

4. Ongoing self-evaluation focuses on cost-effective strategies to disseminate information. The network of information specialists, led by the participation workgroup, evaluates both individual centers and the network as a whole. For example, the workgroup recently developed materials that show the relationship between the number of hours spent on information services and how those hours are allocated to various projects.

5. Presentation materials, including the PowerPoint presentation "Information Services in the Regional Resource and Federal Centers Network," brochures, and bookmarks, provide easy-to-access information on RRC services to state policymakers and other requestors. Promoting this type of technical assistance to state leaders and enabling easy access and the understanding of all the types of

## What is the RRFC?

The Regional Resource and Federal Center (RRFC) Network is composed of six Regional Resource Centers and a Federal Resource Center, as authorized in the Individuals with Disabilities Education Act (IDEA). The RRCs have existed in a variety of forms since 1969; they were originally created to help identify exemplary programs and disseminate that information to the field. Over time, the emphasis has shifted to helping all 60 states and territories increase their capacity to serve children and youth with disabilities, to comply with IDEA, and to provide assistance to educators in all aspects of program development.





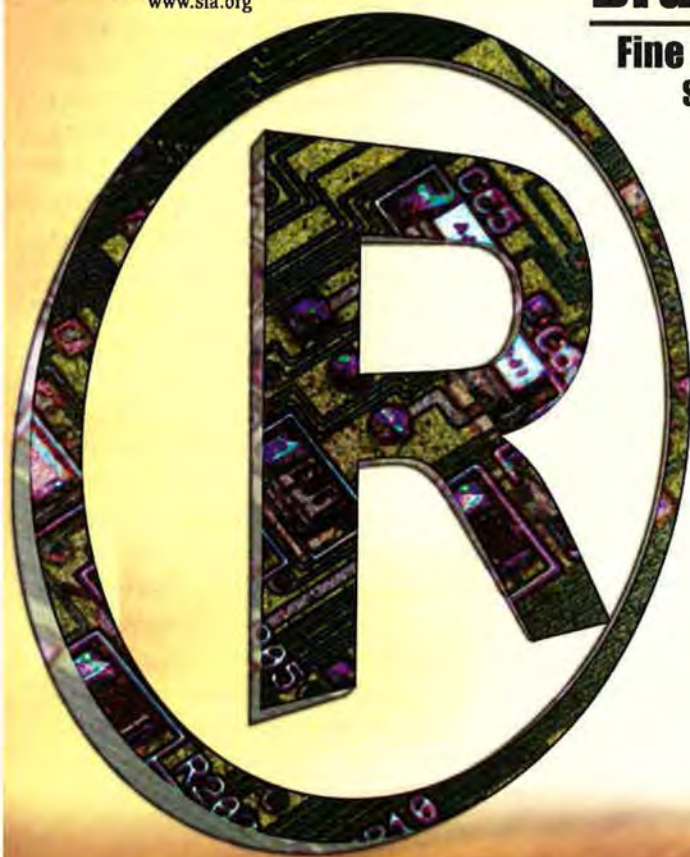
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## Critical Learning Questions

1. What is a brand portfolio, how is it defined, and what role does it play in brand management?
2. How can an information service brand be revitalized?
3. What are the best long-term brand management strategies for taking advantage of opportunities?
4. How can some common information services branding challenges be successfully overcome?

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information work the network can do are important aspects of the service to states. New state staff members frequently are not aware of these services and are very grateful when they discover that they do not have to do all the research themselves.

Another important tool the information specialists use is the National State Policy Database (NSPD), developed collaboratively by the National Association of State Directors of Special Education (NASDSE) and the Great Lakes Area RRC, with contributions from the other five RRCs. It provides detailed information on special education policy for most states. "Now that we have a website with the special education regulations of almost every state," says Susan Colchin of the Great Lakes RRC in Columbus, Ohio, "we can easily see how different states deal with policy issues."

One of the key aspects of the network is that information specialists can refer requests from their states to the entire network via an electronic mailing list operated by one of the centers. Requests posted to this list usually receive responses from several RRCs with information they have gathered from their states. Often a state contacts its RRC because it is developing a policy and wants to know how other states have dealt with a particular issue. For this kind of request, the information specialists rely less on materials already available and more on their contacts in each state. "We have to stay way ahead of the curve to keep up with the needs of our states," says Camilla Bayliss from the Western RRC, "and that's always a challenge in a climate of rapidly changing policy."

Teresa Blythe from Mid-South RRC says that her center has received 35 requests from states in its region for copies of other state disability definitions or specific eligibility criteria for various disability categories. She has used the NSPD to search for these materials and provided the results to each state, including a link to the database. "One state told me that they appreciated having all the special education regulations for all the states in one place," Blythe says.

Daphne Worsham of Western RRC explains, "Resources like the National State Policies Database enable us to gather greater quantities of information, and greater detail, in much less time than if responding to every request meant starting from scratch with calls to state offices. We can assure our clients that they are receiving accurate information—a representative sampling of what other states are doing—and we can format or

summarize the information in ways that will be most useful to the client state. Recently, we compiled and indexed nearly 20 substantive documents in CD-ROM format for Oregon's Legislative Task Force. These resources—samples of legislation, research, and best practices—enabled the task force to hit the ground running in examining the state's policies and legislation regarding special education, and to make truly educated suggestions for reform. The electronic format enabled the documents to be portable and easily searched, and conserved paper, something that also supports the information specialist's 'right format' philosophy."

In an effort to further the "one-stop shopping" idea and make services more readily available to clients, most of the RRCs have posted online request forms on their websites. These forms provide the entry point for a wide variety of Web surfers, parents, graduate students, legislators, and others seeking information in the area of special education, disabilities, and education law.

### On the Cutting Edge

Staying ahead of the curve also means continuously updating network procedures and developing new tools as the need arises. Currently, work is under way on a database that contains profiles of each state. This tool will enable the RRCs to target states most likely to have the information needed when filling certain types of requests. Also in development is a website especially designed to train and support new information specialists. "Information services have been a strength of the network for many years," says Ethel Bright, director of the Federal Resource Center for Special Education in Washington, D.C. The RRC Network's external program evaluation reviewed RRC services and structures as well as feedback from state directors and key stakeholders. This evaluation concluded that "RRCs are contributing broadly and deeply to state systemic change efforts and States' utilization of research-based information to reform practices."

### From One Person to a Network of Information Specialists

Information specialist Kathleen Richman of the Mountain Plains RRC is in a unique position to speak to many different stakeholders in the special education spectrum. As the parent of a child with Down's syndrome, a former special educator, and now an information specialist, her perspective helps her work with people who need information, whether they are parents or special education directors. "We continue to go through a number of problems with the education system," says Richman.



"These problems can be very challenging, but they give me a good perspective for looking at the system." For a while, Richman home-schooled her daughter part time to "give her the extra help that she needed in academics." She adds, "Our daughter has always had an incredible ability to learn, and when she's provided with the resources that she needs to learn, she excels. Now that our daughter has returned to regular schools full time and I'm working as an information specialist, I can see how the work that I do affects her education and her life. That kind of impact is not always so easy to measure in today's educational system, so it's great to know I'm making a difference."

One might assume that most information specialists in the centers would, like Kathleen Richman, have a degree in special education. In fact, the current RRFC team includes more than 60 years of varied education and experience. Staff members hold degrees ranging from biology education, child development, and library/information science to educational psychology, family studies, and educational technology. While special education is clearly the bedrock of the system, it is the research skills, communication abilities, and technical expertise of diverse individuals that make the

network such a powerful tool for information management. Unlike researchers just a decade ago, who were dependent on a library and a few geographically limited personal contacts for information, contemporary information specialists are far more dependent on the technology of databases, websites, electronic mailing lists, and e-mail connections in ferreting out the answers to requests. The specialists' varied backgrounds also lead to strong personal connections with other projects in the larger Office of Special Education technical assistance network, with university research projects, and with specific disability advocacy groups. Annual meetings, monthly teleconferences, special project task groups, and conferring on difficult requests all strengthen the communication system and the richness of resources that information specialists, and their states, rely on.

### Contact Information

For links to the network, visit the Federal Resource Center website:

<http://www.dsc.org/frc>

National State Policy Database (NSPD)

<http://www.glarrc.org/Resources/NSPD.cfm>

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## coming events

### August 2003

Society of American Archivists  
(SAA)  
August 18-24  
Los Angeles, CA  
<http://www.archivists.org/>

Australian Library &  
Information Association and  
Australian Law Librarians' Group  
10th Asia Pacific Special, Health  
and Law Librarians'  
Conference  
August 24-27  
Adelaide, South Australia  
<http://conferences.alia.org.au/shllc2003/>

Association for Computing  
Machinery HyperText 03  
August 26-30  
Nottingham, UK  
<http://www.ht03.org>

### September 2003

Great Lakes Regional  
Conference V  
September 17-19  
Grand Rapids, MI  
<http://www.sla.org/conf/grllks/>

SLA Virtual Seminar  
Branding Master Class:  
Fine-Tuning Information  
Service Brands  
September 24  
Learn from anywhere in the  
world!  
[www.sla.org/virtualeseminar](http://www.sla.org/virtualeseminar)

30th Research Conference on  
Communication Information  
& Internet Policy  
September 26-30  
Alexandria, VA  
<http://www.tprc.org/TPRC02/2002.htm>

### November 2003

SLA Virtual Seminar  
The Visible Librarian: A  
Marketing and Advocacy Primer  
November 19  
Learn from anywhere in the  
world!  
[www.sla.org/virtualeseminar](http://www.sla.org/virtualeseminar)

December 2003  
SLA Virtual Seminar  
Business and Planning  
December 3  
Learn from anywhere in the  
world!  
[www.sla.org/virtualeseminar](http://www.sla.org/virtualeseminar)

### January 2004

Digital Information Exchange:  
Pathways to Build Global  
Information Society  
January 21-23, 2004  
New Delhi, India  
<http://www.cenlib.iitm.ac.in/sis2004/index.html>

### October 2003

Theatre Library Association  
Performance Documentation  
and Preservation in an  
Online Environment  
October 10  
New York, NY  
<http://tla.library.unt.edu/symposium.html>

SLA Virtual Seminar  
Knowledge Management  
October 29  
Learn from anywhere in  
the world!  
[www.sla.org/virtualeseminar](http://www.sla.org/virtualeseminar)

SLA Winter Meeting  
2004 January 22-24  
Albuquerque, New Mexico  
USA


### June 2004

SLA Annual Conference  
June 5-10, 2004  
Nashville, Tennessee USA  
[www.sla.org/nashville2004](http://www.sla.org/nashville2004)

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